

IDAHO EMPLOYMENT

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In this edition of Idaho Employment we convert our Nonfarm Payroll Jobs from the former Standard Industrial Classification (SIC) to the new North American Industrial Classification System (NAICS). On page 21, the FYI section includes an article, which explains the changes in the categories and provides examples of businesses in the area that are classified in the new categories.

Civilians Serving Military Duty — How to Report on Current Employment Statistics (CES) Survey



Information on how to classify employees who are currently serving in the military is provided on page 42 of the FYI section.

State Overview

FEBRUARY DEVELOPMENTS

The seasonally adjusted unemployment rate for February 2003 was 5.3 percent, a decrease of two-tenths of a percentage point from January's revised rate of 5.5 percent. Idaho's February unemployment rate was four-tenths of a percentage point below the 5.9 percent rate experienced one year ago. The 5.3 percent unemployment rate was the lowest since November 2001. The national unemployment rate in February was 5.8 percent, up one-tenth of a percentage point from January.

Idaho's seasonally adjusted *Civilian Labor Force* increased in February from January. The number of unemployed persons decreased by 1,100 to 37,000 in February. Seasonally adjusted, the number of persons working increased by 4,000 to 656,900.

From one year ago, the number of persons employed increased by 10,800 and the number of persons unemployed decreased by 3,200. As a

Continued on page 2

REVISIONS ANNOUNCED FOR 2002 LABOR FORCE DATA

The Idaho Department of Labor has completed the annual benchmarking of the 2002 labor force data. This process is done every year in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics (BLS). The benchmarking revisions to Idaho's employment data were the most significant since 1978 when the current series of comparable labor force statistics began. The revised numbers show that Idaho's monthly unemployment rates in 2002 were higher than previously estimated because fewer people were employed than originally reported.

These substantial changes were due to a revision in the monthly Current Population Survey (CPS) data collected by the U.S. Bureau of the Census. The CPS understated the downturn in Idaho's economy in the fourth quarter of 2001. The benchmarking process corrected this under-reporting. The revisions confirm that after 15 years of economic growth, which completely missed the impact of the 1990-91 national recession, Idaho's economy in 2002 was more vulnerable to national events than in the past. While the electronics manufacturing industry appeared to suffer most from that vulnerability, it was also the primary cause of past economic growth in Idaho.

Based on this year's annual benchmark, total employment in Idaho was revised downward by an average of 7,200 persons while total unemployment was revised upward by an average of 2,600 persons. These revisions resulted in the 2002 annual unemployment rate being revised upward to 5.8 percent from the previously estimated 5.4 percent. Monthly employment data for 2002 has now been adjusted to reflect the new annual average numbers. FYI Table 13 (on pages 40-41) provides the revised 2002 data.

result of the changes in the number of persons employed and unemployed, the labor force increased 1.1 percent, or 7,600, since February 2002. Nationally, the number employed increased by nearly two million people between February 2002 and February 2003. This was a 1.5 percent increase compared to a 1.8 percent increase in Idaho.

A decrease in the seasonally adjusted unemployment rate from January to February is unusual, particularly if it is accompanied by an employment increase and a decline in the number of unemployed. As with the 2002 data revisions, state analysts speculate that the CPS component of the employment model might be causing atypical monthly changes. These analysts caution the reader not to put undue significance to the monthly change, as a month does not make a trend.

Area and County Labor Force Data

State Table 1 on page 3 provides February labor force data by county, some of which are grouped into Labor Market Areas (LMAs) designated by the U.S. Bureau of Labor Statistics. Area data is derived by adding each county's total employment and unemployment numbers, then calculating the unemployment rate using the total numbers.

The Panhandle LMA had the highest unemployment rate, 7.9 percent, in February followed by the Idaho-Lewis LMA at 7.6 percent. These two northern Idaho LMAs consistently have the highest unemployment rates among all the state's LMAs. The Seaport and Bonneville LMAs each had 3.7 percent unemployment rates for the lowest in the state. The Boise MSA, which for years has had an unemployment rate below 4.0 percent, was at 5.0 percent, reflecting the higher unemployment rate trend that started about a year-and-a-half ago with layoffs in the high-tech industries.

Four counties showed double-digit unemployment rates in February and two showed rates below 3.0 percent. The unemployment rates in counties with a labor force in excess of 20,000 ranged from a high of 7.4 percent in Kootenai County (Coeur d' Alene area) to a low of 3.3 percent in Bonneville County (Idaho Falls area).

Industry Employment Developments

February *Nonfarm Payroll Jobs* increased slightly from January with an addition of 2,400 jobs. The net growth was due to the increase in *Service-Producing* industries, which added enough jobs to overcome the job loss that occurred in the *Goods-Producing* industries. *Service-Producing* employment grew by 0.8 percent by adding 3,400 jobs, while *Goods-Producing* industries lost 1,000 jobs for a 1.0 percent decline.

Year-over-year, the same job loss/gain combination occurred—*Service-Producing* industries added 6,500 jobs and the *Goods Producing* industries lost 1,900 jobs. Overall, *Nonfarm Payroll Jobs* increased by 4,600 for a 0.8 percent growth rate. February's *Nonfarm Payroll Jobs* employment of 552,800 was up from January's total of 550,400. Idaho ended 2002 with 570,700 *Nonfarm Payroll Jobs* in December, so there was a substantial job loss since then. The loss can be attributed to some significant layoffs, the end of holiday season jobs, and other seasonal factors.

Within the *Goods-Producing* industries, *Construction* declined by 400 jobs between January and February 2003, but gained 500 jobs from

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or to the Regional Labor Economists noted in each area news section.

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one year ago. Cold weather always affects some construction activity, particularly road and bridge construction. While modest, the over-the-year gain equated to a 1.6 percent growth rate. This rate was below the growth rates experienced in the late 1990s, but it remained positive.

The forest products industry of *Logging* experienced job losses both on the monthly and over-the-year basis. *Logging's* saga remains much the same as it has for the last two years: diminished logging on federal lands, and sawmills not accumulating large inventories of saw logs and lumber due to slow market conditions and low prices.

The big news occurring with *Computer & Electronic Product Manufacturing* can be found by looking at the year-over-year change. The loss of 1,100 jobs, or a 6.1 percent job loss rate, is due to a large number of layoffs at several electronic companies during 2002. The 1,100 workers laid off at Micron Technology, Inc. in late February will be reflected in the March data. This Boise-based manufacturing of DRAM and other types of microchips cited low chip prices and the resulting low earnings as the reason for the layoff. The electronics industry has suffered throughout the national recession but Micron was able to resist major layoffs until now.

Food Manufacturing, or food processing, is another industrial sector that has experienced employment declines in recent years. Consumer product preferences, transportation costs, and international competition have slowly reduced *Food Manufacturing* employment. A year-over-year loss of nearly 600 jobs confirms this trend. More job losses are anticipated as several processors have announced plant closures or major layoffs that will occur later this year. The build-up of dairying and cheese manufacturing in southern Idaho has slowed because of increased complaints by neighbors about odors and other environmental degradations from existing and potential large feeding operations.

Other Durable Goods Manufacturing deserves mention because this residual classification includes two industries, relatively new to Idaho, with sizeable employment. One is office and other types of furniture manufacturing (located in the Coeur d'Alene area) and medical supplies manufacturing and packaging (in the Pocatello area). Both of these industries have up and down cycles because of market demand.

Only a few *Service-Producing* industries had either monthly and/or year-over-year employment losses. *Wholesalers, Nondurable Goods* have experienced slow-downs due to the general economic conditions as well as reduced sales in some commodity markets. The *Retail Trade* sectors of food and general merchandise sales not only had usual, reduced post-holiday staffing

State Table 1: February 2003 Labor Force (preliminary)

Seasonally Adjusted	Labor Force	Unemp.	% Unemp.	Total Emp.
Seaport LMA	36,190	1,343	3.7	34,847
Nez Perce County	24,105	898	3.7	23,207
Asotin County, WA	12,085	445	3.7	11,639
Boise City MSA	249,696	12,559	5.0	237,136
Ada County	179,322	7,863	4.4	171,459
Canyon County	70,373	4,696	6.7	65,677
Pocatello City MSA*	40,246	2,098	5.2	38,148
Bonneville LMA	82,908	3,086	3.7	79,822
Bingham County	22,118	973	4.4	21,145
Bonneville County	49,124	1,636	3.3	47,488
Butte County	1,556	82	5.3	1,474
Jefferson County	10,110	394	3.9	9,716
Cassia-Minidoka LMA	20,614	1,437	7.0	19,177
Cassia County	10,346	657	6.4	9,689
Minidoka County	10,268	780	7.6	9,488
Idaho-Lewis LMA	8,236	628	7.6	7,608
Idaho County	6,751	567	8.4	6,184
Lewis County	1,485	61	4.1	1,424
Panhandle LMA	92,129	7,316	7.9	84,813
Benewah County	4,379	540	12.3	3,839
Bonner County	17,784	1,422	8.0	16,362
Boundary County	4,349	308	7.1	4,041
Kootenai County	59,225	4,369	7.4	54,856
Shoshone County	6,392	676	10.6	5,716
Magic Valley LMA	52,586	2,126	4.0	50,460
Gooding County	7,383	283	3.8	7,101
Jerome County	9,774	397	4.1	9,378
Twin Falls County	35,428	1,446	4.1	33,982
Adams County	1,826	215	11.8	1,611
Bear Lake County	3,122	194	6.2	2,928
Blaine County	12,542	508	4.1	12,033
Boise County	2,653	148	5.6	2,505
Camas County	483	37	7.7	446
Caribou County	3,294	249	7.6	3,045
Clark County	615	34	5.5	582
Clearwater County	3,704	383	10.4	3,320
Custer County	2,289	170	7.4	2,119
Elmore County	10,002	708	7.1	9,294
Franklin County	5,536	259	4.7	5,277
Fremont County	5,179	308	6.0	4,871
Gem County	6,032	402	6.7	5,631
Latah County	16,375	526	3.2	15,849
Lemhi County	3,907	280	7.2	3,627
Lincoln County	2,275	112	4.9	2,163
Madison County	12,126	238	2.0	11,888
Oneida County	1,784	90	5.0	1,694
Owyhee County	4,058	103	2.5	3,955
Payette County	9,908	771	7.8	9,137
Power County	3,317	286	8.6	3,031
Teton County	3,905	151	3.9	3,753
Valley County	4,090	331	8.1	3,759
Washington County	4,329	355	8.2	3,975
State of Idaho	693,867	37,004	5.3	656,863
Idaho Cities				
Boise	97,307	4,738	4.9	92,569
Coeur d'Alene	20,929	1,162	5.6	19,766
Idaho Falls	29,799	1,046	3.5	28,753
Lewiston	20,618	667	3.2	19,951
Nampa	21,505	1,492	6.9	20,013
Pocatello	29,142	1,482	5.1	27,660
Twin Falls	18,647	786	4.2	17,861

* Pocatello MSA includes all of Bannock County.

needs, but problematic consumer confidence levels have led to a soft sales market condition. The year-over-year loss in *Scientific Research and Development* jobs was centered at the Idaho National Engineering & Environmental Laboratory (INEEL) located in Eastern Idaho. The INEEL's nuclear research and environmental clean-up projects have gone through a change in focus and one older research reactor is in the process of being deactivated. The *Accommodation* industry is still feeling the effects of reduced business travel due to September 11 events and now travel security concerns are heightened again by the war in Iraq. On the other hand, the entire *Leisure and Hospitality* cluster had positive gains during the winter recreation season and eating places showed positive gains in an extremely competitive environment.

The new NAICS designation for business services is *Administrative and Support Services*. Included in this classification are two types of businesses that have had relatively high growth rates in Idaho, but have also been accompanied by short-term ups and downs. The two industries are employment/temporary help agencies and telephone call centers. Although there was virtually no change in *Administrative and Support Services* employment from January to February 2003, the Year-over-year growth rate was nearly 10 percent.

There is another new NAICS industry classification that may draw the reader's interest: *Management of Companies and Enterprises*. These business organizations might be also referred to as corporate office, central office, district office, etc. Boise Corp.'s (formerly known as Boise Cascade) corporate office is an example in Idaho, but this classification also includes such entities as the business office of a franchisee that owns a group of fast-food outlets. The employment numbers are dependent upon how the employer elects to report employment—whether the central management/administrative staff is broken out separately and included in a total employment number, or the staff is classified in conjunction with an operational entity of the business. Approximately 1.5 percent of the state's *Nonfarm Payroll Jobs* were included in this management classification in February.

There was an increase of 500 jobs in *State Government* employment from January to February, all of it reflected in *State Government Education*. The increase was caused by the addition of work-study and other temporary campus jobs as the new semester began. Compared to February 2002, the employment picture for *State Government* is negative. The Governor ordered funding reductions and holdbacks for state agencies, including colleges and universities. This has resulted in 900 fewer *State Government* jobs in February 2003 than in February 2002.

Local Government experienced the opposite as both month-over-month and year-over-year employment levels increased. Idaho's population continues to grow and this places more demand for educational and government services at the local level.

Agriculture

Late winter snow and rainstorms were sufficient to alleviate most of the concerns about another drought in Southern Idaho. Sufficient stream flows for irrigation and hydroelectric power generation are predicted for most of the area's irrigated crop locations and river systems. Low water concerns remain, however, for southern Twin Falls County and southwestern Owyhee County. There still is a need for more moisture to completely fill reservoirs and to have some carryover water stored for next year.

Potato growers are facing an uncertain season. Due to lower demand for frozen potato products, Idaho food processors have significantly reduced the amount of contracted potatoes they will buy. Growers have to decide whether to limit production to near the contracted amount or to exceed it in hopes of higher prices and demand on the open market. Several processors have announced plant closures or major layoffs, signaling their prediction that the market will remain soft, at least for the types of potatoes grown best in Idaho.

It is estimated that 21,350 hired agricultural workers were employed in February. The increase of the dairy industry in Idaho also means that more of the hired workers are not seasonal employees. Land and equipment preparation, and the annual calving and lambing season accounted for the main portion of work for other farm and ranch employees.

State Table 3 on page 6 shows a year-over-year employment increase of 19.3 percent. It is unlikely such a large change actually occurred, however, the 2003 estimating model used includes 2000 Census data for the first time. This accounts for most of the adjustment in the employment numbers. However, since the winter this year has been relatively mild, growers and ranchers might have accelerated their seasonal hiring, thereby adding to the significant increase.

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State Table 2: Nonfarm Payroll Jobs

BY PLACE OF WORK	% Change From				
	Feb 2003*	Jan 2003	Feb 2002	Last Month	Last Year
Nonfarm Payroll Jobs**	552,800	550,400	548,200	0.4	0.8
GOODS-PRODUCING INDUSTRIES	96,400	97,400	98,300	-1.0	-1.9
Natural Resources & Mining	3,300	3,600	3,600	-8.3	-8.3
Logging	1,700	1,900	2,000	-10.5	-15.0
Mining	1,600	1,700	1,600	-5.9	0.0
Metal Ore Mining	500	500	500	0.0	0.0
Construction	31,500	31,900	31,000	-1.3	1.6
Manufacturing	61,600	61,900	63,700	-0.5	-3.3
Durable Goods	38,500	38,600	39,600	-0.3	-2.8
Wood Product Manufacturing	7,400	7,400	7,200	0.0	2.8
Sawmills & Wood Preservation	3,000	3,000	3,000	0.0	0.0
Veneer & Engineered Products	1,300	1,300	1,200	0.0	8.3
Other Wood Product Manufacturing	3,100	3,100	3,000	0.0	3.3
Fabricated Metal Product Manufacturing	3,600	3,600	3,500	0.0	2.9
Machinery Manufacturing	2,900	2,900	2,800	0.0	3.6
Computer & Electronic Product Manufacturing	17,000	17,000	18,100	0.0	-6.1
Transportation Equipment Manufacturing	2,100	2,100	2,000	0.0	5.0
Other Durable Goods	5,500	5,600	6,000	-1.8	-8.3
Nondurable Goods	23,100	23,300	24,100	-0.9	-4.1
Food Manufacturing	15,600	15,700	16,200	-0.6	-3.7
Fruits & Vegetable Preserving & Specialty	7,800	8,000	8,400	-2.5	-7.1
Paper Manufacturing	1,700	1,700	1,700	0.0	0.0
Printing & Related Support Activities	2,000	2,000	2,000	0.0	0.0
Chemical Manufacturing	1,800	1,800	1,900	0.0	-5.3
Other Nondurable Goods	2,000	2,100	2,300	-4.8	-13.0
SERVICE-PRODUCING INDUSTRIES	456,400	453,000	449,900	0.8	1.4
Trade, Transportation, & Utilities	111,900	112,400	112,600	-0.4	-0.6
Trade	93,800	94,300	94,300	-0.5	-0.5
Wholesale Trade	24,200	24,300	24,600	-0.4	-1.6
Wholesalers, Durable Goods	11,500	11,500	11,200	0.0	2.7
Wholesalers, Nondurable Goods	11,000	11,000	11,600	0.0	-5.2
Retail Trade	69,600	70,000	69,700	-0.6	-0.1
Motor Vehicle and Parts Dealers	10,200	10,400	10,300	-1.9	-1.0
Building Material and Garden Equipment	7,200	7,200	6,900	0.0	4.3
Food & Beverage Stores	12,200	12,300	12,300	-0.8	-0.8
General Merchandise Stores	14,000	14,200	14,000	-1.4	0.0
Transportation, Warehousing, & Utilities	18,100	18,100	18,300	0.0	-1.1
Utilities	1,900	1,900	1,800	0.0	5.6
Transportation & Warehousing	16,200	16,200	16,500	0.0	-1.8
Rail Transportation	1,300	1,300	1,300	0.0	0.0
Truck Transportation	8,200	8,000	8,000	2.5	2.5
Information	9,000	9,000	9,100	0.0	-1.1
Telecommunications	3,100	3,100	3,100	0.0	0.0
Financial Activities	25,600	25,300	25,200	1.2	1.6
Finance & Insurance	19,200	19,000	19,000	1.1	1.1
Real Estate & Rental & Leasing	6,400	6,300	6,200	1.6	3.2
Professional & Business Services	66,900	66,700	64,500	0.3	3.7
Professional, Scientific, & Technical	28,000	27,800	28,100	0.7	-0.4
Scientific Research & Development	7,100	7,100	7,400	0.0	-4.1
Management of Companies & Enterprises	8,400	8,400	8,600	0.0	-2.3
Administrative & Support & Waste Management	30,500	30,500	27,800	0.0	9.7
Administrative & Support Services	29,400	29,400	26,800	0.0	9.7
Educational & Health Services	61,200	60,600	58,900	1.0	3.9
Educational Services	7,100	6,700	6,700	6.0	6.0
Health Care & Social Assistance	54,100	53,900	52,200	0.4	3.6
Hospitals	13,300	13,300	13,400	0.0	-0.7
Leisure & Hospitality	52,200	51,800	50,000	0.8	4.4
Arts, Entertainment, & Recreation	8,600	8,200	6,500	4.9	32.3
Accommodation & Food Services	43,600	43,600	43,500	0.0	0.2
Accommodation	7,100	7,200	7,300	-1.4	-2.7
Food Services & Drinking Places	36,500	36,400	36,200	0.3	0.8
Other Services	17,100	16,800	17,600	1.8	-2.8
Total Government	112,500	110,400	112,000	1.9	0.4
Federal Government	12,100	12,000	12,100	0.8	0.0
State & Local Government	100,400	98,400	99,900	2.0	0.5
State Government	28,600	28,100	29,500	1.8	-3.1
State Government Education	14,000	13,500	14,300	3.7	-2.1
State Government Administration	14,600	14,600	15,200	0.0	-3.9
Local Government	71,800	70,300	70,400	2.1	2.0
Local Government Education	38,600	37,400	37,800	3.2	2.1
Local Government Administration	30,700	30,400	30,200	1.0	1.7
Local Government Tribes	2,500	2,500	2,400	0.0	4.2

*Preliminary Estimate

** Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.

State Table 3: Economic Indicators

	Feb 2003	Jan 2003	Feb 2002	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE ⁽¹⁾					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	693,900	691,000	686,300	0.4	1.1
Unemployment	37,000	38,100	40,200	-2.9	-8.0
Percent of Labor Force Unemployed	5.3	5.5	5.9		
Total Employment	656,900	652,900	646,100	0.6	1.7
<i>Unadjusted</i>					
Civilian Labor Force	684,200	681,300	676,600	0.4	1.1
Unemployment	45,800	46,600	48,900	-1.7	-6.3
Percent of Labor Force Unemployed	6.7	6.9	7.2		
Total Employment	638,400	633,700	627,700	0.7	1.7
U. S. UNEMPLOYMENT RATE ⁽²⁾	5.8	5.7	5.6		
U.S. CONSUMER PRICE INDEX ⁽²⁾					
Urban Wage Earners & Clerical Workers (CPI-W)	179.2	177.7	173.7	0.8	3.2
All Urban Consumer (CPI-U)	183.1	181.7	177.8	0.8	3.0
AGRICULTURE					
Agriculture Employment	30,720	29,650	27,270	3.6	12.7
Operators	9,010	9,010	9,010	0.0	0.0
Unpaid Family	360	360	370	0.0	-2.7
Hired Workers	21,350	20,280	17,890	5.3	19.3
UNEMPLOYMENT INSURANCE					
<i>Claims Activities</i>					
Initial Claims ⁽³⁾	14,302	17,203	11,422	-16.9	25.2
Weeks Claimed ⁽⁴⁾	125,508	127,235	119,406	-1.4	5.1
<i>Benefit Payment Activities⁽⁵⁾</i>					
Weeks Compensated	109,469	105,554	102,352	3.7	7.0
Total Benefit \$ Paid	\$24,354,097	\$23,601,698	\$22,907,425	3.2	6.3
Average Weekly Benefit Amount	\$222.47	\$223.60	\$223.81	-0.5	-0.6
Covered Employers	40,805	40,926	39,862	-0.3	2.4
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$215,282,957	\$213,836,285	\$164,916,318	0.7	30.5

(1) Preliminary Estimate

(2) Source: U.S. Bureau of Labor Statistics

(3) Includes all entitlements/programs on Intrastate and Interstate Agent, New, and Additional Claims

(4) Includes all entitlements/programs, Intrastate and Interstate Agent

(5) Includes all entitlements/programs, Total Liable Activities



PANHANDLE

BENEWAH, BONNER, BOUNDARY, KOOTENAI, & SHOSHONE COUNTIES

EMPLOYMENT TRENDS

The Panhandle's seasonally adjusted unemployment rate fell from 8.6 percent in January to 7.9 percent in February. Exceptionally warm, dry weather kept more people working in *Construction, Logging, and Transportation* than normal in February. Some of the unemployment decrease resulted from Panhandle residents dropping out of the labor force, at least temporarily. When individuals quit actively looking for jobs, they no longer are counted as unemployed, so they are not included in the labor force numbers. Two years of poor job prospects have caused some Panhandle residents to give up looking for work or to move elsewhere, thereby reducing the unemployment rate.

For the first time since August 2001, *Goods-Producing Industries* showed year-over-year job gains, adding 270 jobs. Although *Manufacturing* remains 400 jobs below its peak of 7,189 jobs in August 2001, it added a net 130 jobs between February 2002 and February 2003. It gained 70 jobs at Sandpoint-based Litehouse in *Food Manufacturing*, 60 jobs at Sandpoint-based Unicep Packaging and other plastic product manufacturers, and 110 jobs in *Wood Products*, while it lost jobs in electronics, furniture, and metal products. (In the former SIC system, *Manufacturing* included logging and newspaper, book, and magazine publishing. Now, logging is the largest part of *Natural Resources & Mining* and publishing is the largest part of *Information*.) Low mortgage rates fueling residential construction and good weather boosted *Construction* employment from 3,600 jobs last February to 3,790 this February. *Natural Resources & Mining* was the only *Goods-Producing* sector to show a net job loss, losing 40 logging jobs and 10 mining jobs.

Trade, Transportation, & Utilities showed virtually no change between February 2002 and February 2003, as job losses in *Transportation* nearly offset marginal job gains in *Wholesale Trade* and *Retail Trade*. Throughout the 1990s, *Retail Trade* grew rapidly, adding an average of 460 jobs per year. The economic slowdown since 2001 and the downsizing of Sandpoint-based cata-

Panhandle Table 1: Labor Force & Employment

	Feb 2003*	Jan 2003	Feb 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	92,130	92,280	91,070	-0.2	1.2
Unemployed	7,320	7,940	7,630	-7.8	-4.1
% of Labor Force Unemployed	7.9	8.6	8.4		
Total Employment	84,810	84,340	83,440	0.6	1.6
Unadjusted					
Civilian Labor Force	90,910	91,530	89,890	-0.7	1.1
Unemployed	9,820	10,050	10,220	-2.3	-3.9
% of Labor Force Unemployed	10.8	11.0	11.4		
Total Employment	81,090	81,480	79,670	-0.5	1.8
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS					
Goods-Producing Industries	12,090	12,260	11,820	-1.4	2.3
Natural Resources & Mining	1,510	1,510	1,560	0.0	-3.2
Construction	3,790	3,890	3,600	-2.6	5.3
Manufacturing	6,790	6,860	6,660	-1.0	2.0
Wood Product Manufacturing	2,840	2,860	2,730	-0.7	4.0
Other Manufacturing	3,950	4,000	3,930	-1.3	0.5
Service-Producing Industries	53,780	53,780	52,910	0.0	1.6
Trade, Transportation, & Utilities	12,940	13,020	12,930	-0.6	0.1
Wholesale Trade	1,290	1,290	1,280	0.0	0.8
Retail Trade	10,000	10,050	9,960	-0.5	0.4
Utilities	360	360	360	0.0	0.0
Transportation & Warehousing	1,290	1,320	1,330	-2.3	-3.0
Information	1,260	1,240	1,270	1.6	-0.8
Financial Activities	2,840	2,850	2,710	-0.4	4.8
Professional & Business Services	6,160	6,180	5,950	-0.3	3.5
Educational & Health Services	6,770	6,720	6,410	0.7	5.6
Leisure & Hospitality	7,160	7,220	7,150	-0.8	0.1
Other Services	2,170	2,150	2,160	0.9	0.5
Government Education	5,210	5,060	5,180	3.0	0.6
Government Administration	8,330	8,370	8,220	-0.5	1.3
Government Tribes	940	970	930	-3.1	1.1

* Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

log company Coldwater Creek prevented *Retail Trade* from adding jobs. In February 1999, *Retail Trade* employed 10,121 people. Four years later, it employed 10,000 people. *Utilities* and *Transportation* exhibit a similar holding pattern, while *Wholesale Trade* lost 240 jobs in those four years.

The *Information* sector employed 1,260 people in February 2003, only 10 fewer than it employed the year before. The 30 jobs lost in *Telecommunications* were almost offset by the 10 jobs gained in *Publishing* and the 10 jobs gained in software development, cable television, Internet service providers, and radio broadcasting.

Financial Activities includes not only the 1,300 jobs at banks and other financial businesses, but also the 740 jobs at insurance companies, the 580 jobs at real estate companies, and the 220 jobs at rental and leasing businesses. Low mortgage rates generated most of the 130 new jobs at real estate firms, mortgage lenders, and title insurance companies.

Professional and Business Services enjoyed a substantial gain of 210 jobs between February 2002 and February 2003. Throughout the economic downturn of the past two years, this sector has bucked downward trends. *Professional, Scientific, & Technical Services* employed 2,170 people in February 2003—70 more than the year before. Tenants at the University of Idaho Research Park in Post Falls provided the primary source of those new jobs. Other components of *Professional and Business Services*, such as call centers, employment agencies, janitorial services, the management of companies, and waste management services, added 140 jobs.

Educational and Health Services added 360 jobs—more than any other sector. Private educational facilities employed 360 people in February 2003, up 40 people from the year before. *Health Care* continued to grow rapidly to 5,020 by adding 210 jobs. (The Panhandle's five community hospitals are not included in this private-sector *Health Care* total; those 2,260 jobs appear in *Government Administration*.) *Social Services*, which also makes up part of *Educational and Health Services*, includes organizations that assist people with disabilities such as Goodwill and TESH; organizations that help teens such as Rocky Mountain Academy; agencies providing personal care in people's homes; senior centers; child care providers; hospices; hotlines; and food banks. *Social Services* employment increased from 1,280 jobs in February 2002 to 1,390 jobs one year later.

Leisure & Hospitality held its own between February 2002 and February 2003. *Arts, Amusements & Recreation*—made up of arts, musical, theatrical, sports, and historical organizations; museums; Silverwood, Wild Waters, Schweitzer Mountain Resort, Skate Plaza, Silver Mountain Resort, Lookout Pass Ski Area, Greyhounds Park, Triple Play, Stateline Showgirls, and other amusement facilities; bowling alleys; golf courses; marinas; and fitness clubs—employed 1,420 people in February 2000 and 1,370 people one year later. The closures of two Coeur d'Alene amusement facilities, GoKart Family Fun and Adventures n'Fun, caused the job losses. (One of the Panhandle's largest amusement facilities, the Coeur d'Alene Tribal Casino near Worley, is not included in these statistics because tribal employment is included in *Government*.) *Accommodation*—hotels, motels, and other accommodations—employed 1,350 people in February 2003—60 fewer people than the year before. The sector's largest industry group, *Food Service & Drinking Places*, grew from 4,380 jobs in February 2002 to 4,500 jobs a year later. (Restaurants and bars used to be included in *Retail Trade* under the former SIC system.)

Other Services seemed static during the 12-month period. *Repair & Maintenance* grew from 760 jobs to 780 jobs because of the opening of some automotive repair businesses. *Personal & Laundry Services*—including barber shops, hair and nail salons, tanning parlors, photography studios, wedding chapels, funeral homes, laundromats, and drycleaners—held steady at 390 jobs. *Religious, Grant-Writing, Civic, Professional, Labor & Other Organizations* include chambers of commerce, labor unions, property associations, fraternal organizations, humane societies, Early Head Start, Panhandle Area Council, chambers of commerce, scouting organizations, Intermountain Forest Indus-

try Association, and the United Way. They employed 1,000 people in February 2003, 10 fewer people than the year before.

AREA DEVELOPMENTS

Benewah County

- Bill and Kim Aiton opened Aiton's Family Furniture in March at the former Paddlewheel Pizza building on Main Avenue in St. Maries. The new store sells furniture, clocks, and home decorations.
- Debby and Keith Powell recently opened Pace Fitness for Women, a fitness center offering circuit training, at 521 Main Avenue in St. Maries.

Bonner County

- The Bonner County Economic Development Corporation recently announced that Mac's Custom Tie-Downs will move to the Sandpoint area from Chehalis, Washington, this summer. The business that manufactures tie-downs for transporting boats, bicycles, specialty cars, and equipment will employ six to eight people when it moves to Sagle. Mac's business is predominantly mail order. It's making the move because it's impressed by the high quality of life and business-friendly environment in the area.
- The economic slowdown and the decline in Canadian visitors are taking a toll on the Sandpoint area's retail sector. The Kmart store in Ponderay permanently closed its doors on March 13, putting 70 people out of work. After 15 years in business, Susan and Harold Smith closed the Incredible Christmas Store in Ponderay following the closure of their store near Cedar Street Bridge in downtown Sandpoint last year. The two closures put five people out of work. At one time, a dozen people worked for the two stores.

Kootenai County

- Coeur d'Alene recently welcomed these new businesses—Cheers Sports Bar & Deli, offering live bands, deejays, karaoke, pool tables, video games, and sports on television in the former Beaudry Motorsports building in Midtown on Fourth Street; Angelheart Pet Salon at 104 Spruce Avenue; Papa's Barber Shop, a classic barber shop at 6064 North Government Way; Connoisseur's Café in the former Rustler's Roost building at 819 Sherman Avenue; Somewhere in Time Second-Hand Store & Hair Salon at 108 East Poplar Avenue; Coeur d'Alene Eye Care Clinic at 409 West Neider Avenue; Anthony's Midtown Bistro in the former Caper's building at 315 East Walnut Avenue; La Cocina Mexican Restaurant at 846 North Fourth Street; and Hometown Pizza in the former Eduardo's Restaurant at 300 Lake Coeur d'Alene Drive.

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SEAPORT

NORTH CENTRAL IDAHO: CLEARWATER, IDAHO, LATAH, LEWIS, & NEZ PERCE COUNTIES

EMPLOYMENT TRENDS

In February, Seaport's *Nonfarm Payroll Jobs* increased by 100 from January 2003—to 26,760 from 26,660. From February 2002, the increase was 120. February's increase, though slight, was still welcome even though the boost in February was less than the increase a year ago. *Education* posted a significant job increase (260), though that is normal because school personnel are returning to classrooms after the Christmas break. *Other Manufacturing*, which increased significantly in February, was a bright spot. Manufacturing jobs outside of the traditional lumber and paper manufacturing sectors continue to grow. Besides *Education* and *Other Manufacturing*, however, employment in all other industries showed decreases.

AREA DEVELOPMENTS

Idaho & Lewis County

- Officials at Bennett Forest Industries are considering moving their Elk City and Grangeville mills to the Lewiston-Clarkston Valley. The company cites high transportation costs, low lumber prices, and a sharp decline in trees being harvested on the Nez Perce National Forest as reasons for the potential move. "At this point in time, we're evaluating the future of the business and its locations," confirmed John Bennett, president of Bennett Forest Industries. Moving would provide the company better access to rail lines, qualified workers and logs, Bennett said. A move to the Lewiston-Clarkston Valley would result in the closure of the Grangeville and Elk City sites, which employ about 110 people, although moving to the Lewiston-Clarkston Valley is only one of the possibilities under consideration. "Staying right here is one of the options," Bennett said. He declined to elaborate on any other plans. According to Bennett, the more generous timber harvests on

Seaport Table 1: Labor Force & Employment
Nez Perce County, Idaho and Asotin County, Washington

	Feb 2003*	Jan 2003	Feb 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	36,190	35,050	34,820	3.3	3.9
Unemployment	1,340	1,390	1,590	-3.6	-15.7
% of Labor Force Unemployed	3.7	4.0	4.6		
Total Employment	34,850	33,660	33,230	3.5	4.9
Unadjusted					
Civilian Labor Force	36,280	35,160	34,970	3.2	3.7
Unemployment	1,730	1,790	2,050	-3.4	-15.6
% of Labor Force Unemployed	4.8	5.1	5.9		
Total Employment	34,550	33,370	32,920	3.5	5.0
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	26,760	26,660	26,640	0.4	0.5
Goods-Producing Industries	4,390	4,410	4,230	-0.5	3.8
Natural Resources & Mining	230	250	200	-8.0	15.0
Construction	910	900	930	1.1	-2.2
Manufacturing	3,250	3,260	3,100	-0.3	4.8
Wood Product Manufacturing	560	570	560	-1.8	0.0
Food Manufacturing	90	110	90	-18.2	0.0
Paper Manufacturing	1,210	1,210	1,200	0.0	0.8
Other Manufacturing	1,390	1,380	1,250	0.7	11.2
Service-Producing Industries	22,370	22,250	22,410	0.5	-0.2
Trade, Transportation & Utilities	5,890	5,990	5,860	-1.7	0.5
Wholesale Trade	620	650	620	-4.6	0.0
Retail Trade	3,980	4,040	3,940	-1.5	1.0
Utilities	80	90	90	-11.1	-11.1
Transportation & Warehousing	1,210	1,210	1,210	0.0	0.0
Information	360	360	370	0.0	-2.7
Financial Activities	1,810	1,830	1,790	-1.1	1.1
Professional & Business Services	1,530	1,530	1,490	0.0	2.7
Leisure & Hospitality	3,800	3,830	3,980	-0.8	-4.5
Education & Health Services	2,570	2,580	2,570	-0.4	0.0
Other Services	1,190	1,190	1,180	0.0	0.8
Government Education	2,480	2,220	2,500	11.7	-0.8
Government Administration	1,850	1,850	1,840	0.0	0.5
Government Tribes	890	870	830	2.3	7.2

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

the Clearwater and Umatilla National Forests and Idaho state lands could feed a Lewiston-Clarkston Valley mill. In the early 1990s, between 60 and 70 million board feet a year were produced from the Nez Perce National Forest compared with about 15 million board feet a year today, and prices have climbed between 25 and 30 percent, according to Bennett. He said his operations need 35 million board feet a year to run at a healthy level. If the Nez Perce National Forest offered more timber sales, it would be more likely Bennett Forest Industries could stay, Bennett said.

- Nearly one quarter of a million dollars in federal, state, and local funding has been granted toward general maintenance improve-

ments scheduled for this summer at the Idaho County Airport. Funding from the Federal Aviation Administration (FAA), administered through the Idaho Division of Aeronautics, will pay for resurfacing, which will include crack repair and seal coating of the approximately 5,100-foot-long, 75-foot-wide runway. Depending on the cost of the bids, additional work could be conducted to widen the connecting taxiways, which would add additional operating service for larger aircraft.

Clearwater

- The only emergency room in the 112-mile span between Lewiston, Idaho, and Missoula, Montana, received a boost when the U.S. Congress passed the Omnibus Appropriations Act in February. The bill included \$500,000 for Orofino's Clearwater Valley Hospital, which plans to expand the Emergency Room (ER) with the funds. Senator Mike Crapo was instrumental in acquiring funding for the hospital. "We were working on a series of projects, and this one was my office's highest priority," said Sen. Crapo. The Clearwater Valley Hospital submitted an appropriations request through Senator Crapo's office two years ago, then again one year ago. The new ER will provide two additional ER bays to supplement the current single bay, plus interior renovations that will increase the number of ER beds from two to four.
- The FAA awarded Orofino \$150,000 in fiscal year 2003 for improvements to the Orofino Airport instead of the expected \$79,000. Over the last three years, the FAA has awarded \$308,000 in grants to the Orofino Airport.

Latah County

- Troutman's Emporium, a Eugene-based clothing store, is closing its 34 stores in five states and liquidating assets to settle \$30 million in debts. The firm, founded by Dallas Troutman nearly 48 years ago, was unable to find a buyer or secure new financing, according to documents filed in U.S. Bankruptcy Court. Emporium employs 1,600 people in Oregon, Washington, Idaho, Nevada, and California. The Moscow store is its only location in north central Idaho and southeastern Washington.
- University of Idaho (UI) researchers will use a NASA grant of nearly \$1 million to develop ultra-low-power computer chips for use in space. It's another coup for UI professor Gary Maki, whose work in space electronics has led to more than \$27 million in government contracts over two decades. The low-voltage chips are designed to cut power usage by factors of 10 to 100. In two years NASA

will try out the chips on a test mission. Engineers at NASA believe the chips could lead to smaller, cheaper satellites by reducing the size of solar panels and batteries on board the craft.

- UI researchers also received two grants from the U.S. Department of Agriculture. The new grants will allow scientists to study methods to improve efficiency in beef cattle and to develop the next generation of wood composite building materials. A \$170,000 grant will be used to conduct research into using wood composite to improve the performance of wood-plastic composites. A \$166,723 grant will be used to research the role of the hormone leptin in beef cattle.

Nez Perce and Asotin (WA) Counties

- Regence BlueShield of Idaho announced in February that they are delaying plans to construct what will be one of Lewiston's largest office buildings at the city's business and Technology Park. The project, which had been scheduled to be finished this year, will not open until late summer of 2005. The economic downturn is the reason for the change of plans. Regence, which employs about 550 people in Lewiston, has paid out more money in benefits than it has received in premiums for the last three years. Income from stocks and bonds has helped the company fill the gap, but in recent months those investments didn't perform as well as they had in the past. David Doeringsfeld, manager of the Port of Lewiston, said the news was not entirely unexpected. "We're disappointed, but we understand the economic decisions that influenced Regence's decision," he said. The port owns the land Regence will use and plans to give it to Regence in exchange for the 100 to 150 new jobs that will be created. Aside from the delay, Regence officials say the plans for the building remain mostly unchanged. It will be about 55,000-square feet, just slightly smaller than previously announced. Regence will move 350 people from its Bryden Avenue office to the new building. Regence's plans are also significant because many hope it will be the anchor tenant in the 41-acre business and technology park. Regence will occupy six acres, leaving room for at least seven more tenants of the same size.

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TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) average annual unemployment rate for February 2003 was 5.0 percent, as shown in Treasure Valley Table 1. This was one-tenth of a percentage point above the January 2002 rate of 4.9 percent and four-tenths of a percentage point below the February 2002 rate of 5.4 percent. Month-over-month, the number of employed persons increased by 6,300, or 2.7 percent, from January, and the number of unemployed individuals increased by 400 individuals, or 3.3 percent. The increasing number of persons employed and the increasing number of persons unemployed created an overall increase of 6,700 individuals, or 2.8 percent, in the *Civilian Labor Force* from January 2003 to February 2003. Year-over-year, the number of employed persons has decreased by 600, or 0.3 percent, and the number of unemployed individuals decreased by 1,000 individuals, or 7.4 percent, creating a net decrease in the *Civilian Labor Force* of 1,600 individuals from February 2002 to February 2003. The *Civilian Labor Force* figures for February 2003 for all ten counties in Southwest Idaho are shown in Treasure Valley Table 2.

Treasure Valley Table 2: February 2003 Seasonally Adjusted Labor Force Figures for Southwest Idaho Counties				
	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	179,322	7,863	4.4	171,459
Adams	1,826	215	11.8	1,611
Boise	2,653	148	5.6	2,505
Canyon	70,373	4,696	6.7	65,677
Elmore	10,002	708	7.1	9,294
Gem	6,032	402	6.7	5,631
Owyhee	4,058	103	2.5	3,955
Payette	9,908	771	7.8	9,137
Valley	4,090	331	8.1	3,759
Washington	4,329	355	8.2	3,975
Statewide	693,867	37,004	5.3	656,863

Treasure Valley Table 1: Boise MSA Labor Force & Employment
Ada and Canyon Counties

	Feb 2003*	Jan 2003	Feb 2002	% Change Last Month	% Change Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	249,700	243,000	251,300	2.8	-0.6
Unemployment	12,600	12,200	13,600	3.3	-7.4
% of Labor Force Unemployed	5.0	4.9	5.4		
Total Employment	237,100	230,800	237,700	2.7	-0.3
Unadjusted					
Civilian Labor Force	248,200	248,800	249,800	-0.2	-0.6
Unemployment	14,400	14,500	15,500	-0.7	-7.1
% of Labor Force Unemployed	5.8	5.8	6.2		
Total Employment	233,800	234,300	234,300	-0.2	-0.2
JOB BY PLACE OF WORK					
Nonfarm Payroll Jobs**	223,300	222,100	222,400	0.5	0.4
GOODS-PRODUCING INDUSTRIES					
Natural Resources & Construction	44,800	45,100	45,400	-0.7	-1.3
Manufacturing	14,200	14,300	14,300	-0.7	-0.7
Durable Goods	30,600	30,800	31,100	-0.6	-1.6
Wood Product Manufacturing	23,900	23,900	24,300	0.0	-1.6
Fabricated Metal Products Mfg.	1,700	1,700	1,800	0.0	-5.6
Machinery Manufacturing	1,400	1,400	1,400	0.0	0.0
Computer & Electronic Manufacturing	1,400	1,400	1,400	0.0	0.0
Transportation Equipment Mfg.	15,200	15,200	16,300	0.0	-6.7
Other Durable Goods	1,600	1,600	1,500	0.0	6.7
Nondurable Goods	2,600	2,600	1,900	0.0	36.8
Food Manufacturing	6,700	6,900	6,800	-2.9	-1.5
Printing & Related Support Activities	5,100	5,200	5,100	-1.9	0.0
Other Nondurable Goods	700	700	800	0.0	-12.5
SERVICE-PRODUCING INDUSTRIES	900	1,000	900	-10.0	0.0
Trade, Transportation, & Utilities	178,500	177,000	177,000	0.8	0.8
Trade	43,100	43,400	43,400	-0.7	-0.7
Wholesale Trade	36,200	36,600	36,300	-1.1	-0.3
Wholesalers, Durable Goods	10,200	10,200	9,900	0.0	3.0
Wholesalers, Nondurable Goods	6,400	6,400	6,100	0.0	4.9
Retail Trade	2,900	2,900	3,000	0.0	-3.3
Food & Beverage Stores	26,000	26,400	26,400	-1.5	-1.5
General Merchandise Stores	4,000	4,000	4,100	0.0	-2.4
All Other Retail Trade	5,400	5,400	5,500	0.0	-1.8
Transportation, Warehousing, & Utilities	16,600	17,000	16,800	-2.4	-1.2
Utilities	6,900	6,800	7,100	1.5	-2.8
Transportation & Warehousing	700	700	700	0.0	0.0
Information	6,200	6,100	6,400	1.6	-3.1
Telecommunications	3,500	3,600	3,700	-2.8	-5.4
Financial Activities	1,400	1,400	1,200	0.0	16.7
Finance & Insurance	12,000	12,000	11,800	0.0	1.7
Real Estate & Rental & Leasing	9,000	9,000	8,800	0.0	2.3
Professional & Business Services	3,000	3,000	3,000	0.0	0.0
Professional, Scientific, & Technical	30,900	30,500	30,300	1.3	2.0
Management of Companies & Ent.	9,800	9,800	9,900	0.0	-1.0
Administrative & Support & Waste Mgmt.	6,700	6,700	6,900	0.0	-2.9
Educational & Health Services	14,400	14,000	13,500	2.9	6.7
Educational Services	27,200	26,600	26,600	2.3	2.3
Health Care & Social Assistance	2,000	1,600	2,300	25.0	-13.0
Hospitals	25,200	25,000	24,300	0.8	3.7
Leisure & Hospitality	8,800	8,800	9,100	0.0	-3.3
Arts, Entertainment, & Recreation	18,900	18,700	18,700	1.1	1.1
Accommodation & Food Services	2,200	2,200	1,900	0.0	15.8
Accommodation	16,700	16,500	16,800	1.2	-0.6
Food Services & Drinking Places	1,900	1,900	2,000	0.0	-5.0
Other Services	14,800	14,600	14,800	1.4	0.0
Total Government	6,600	6,500	6,700	1.5	-1.5
Federal Government	36,300	35,700	35,800	1.7	1.4
State & Local Government	5,200	5,200	5,100	0.0	2.0
State Government	31,100	30,500	30,700	2.0	1.3
State Government Education	13,600	13,200	13,200	3.0	3.0
State Government Administration	4,200	3,900	4,300	7.7	-2.3
Local Government	9,400	9,300	8,900	1.1	5.6
Local Government Education	17,500	17,300	17,500	1.2	0.0
Local Government Administration	10,200	10,000	10,600	2.0	-3.8
	7,300	7,300	6,900	0.0	5.8

* Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

In the Boise City MSA *Nonfarm Payroll Jobs* increased by 1,200, or 0.5 percent, from January 2003 to February 2003, while year-over-year, *Nonfarm Payroll Jobs* increased by 900 in the Boise City MSA. Month-over-month, *Goods-Producing Industries* lost 300 jobs; job decreases were noted in *Natural Resources & Construction* (-100 jobs), *Food Manufacturing* (-100 jobs), and *Other Nondurable Goods Manufacturing* (-100 jobs). Year-over-year, *Goods-Producing Industries* lost 600 jobs; the only industries to experience job gains were *Transportation Equipment Manufacturing* (100 jobs), and *Other Durable Goods Manufacturing* (700 jobs). In that same time period, job losses occurred in *Natural Resources & Construction* (-100 jobs), *Wood Product Manufacturing* (-100 jobs), *Computer & Electronic Product Manufacturing* (-1,100 jobs), and *Printing and Related Support Activities Manufacturing* (-100 jobs).

In *Service-Producing Industries*, job gains outweighed jobs lost with 1,500 jobs added from January 2003 to February 2003. Job gains were experienced in *Transportation & Warehousing Services* (100 jobs), *Administrative & Support Services & Waste Management Services* (400 jobs), *Educational Services* (400 jobs), *Health Care & Social Assistance Services* (200 jobs), *Food Services & Drinking Places* (200 jobs), *Other Services* (100 jobs), *State Government Education* (300 jobs), *State Government Administration* (100 jobs), and *Local Government Education* (200 jobs). Job losses were noted in *All Other Retail Trade* (-400 jobs) and *Information Services* (-100 jobs). Year-over-year, *Service-Producing Industries* gained 1,500 jobs, with job losses noted in *Non-durable Goods Wholesale Trade* (-100 jobs), *Food & Beverage Stores* (-100 jobs), *General Merchandise Stores* (-100 jobs), *All Other Retail Trade* (-200 jobs), *Transportation & Warehousing Services* (-200 jobs), *Information Services* (-200 jobs), *Professional, Scientific, & Technical Services* (-100 jobs), *Management of Companies & Enterprises Services* (-200 jobs), *Educational Services* (-300 jobs), *Hospital Services* (-300 jobs), *Accommodation Services* (-100 jobs), *Other Services* (-100 jobs), *State Government Education* (-100 jobs), and *Local Government Education* (-400 jobs). Job gains were noted in *Durable Goods Wholesale Trade* (300 jobs), *Telecommunications Services* (200 jobs), *Finance & Insurance Services* (200 jobs), *Administrative & Support Services & Waste Management Services* (900 jobs), *Health Care & Social Assistance Services* (900 jobs), *Arts, Entertainment, & Recreation Services* (300 jobs), *Federal Government* (100 jobs), *State Government Administration* (500 jobs), and *Local Government Administration* (400 jobs). The slow growth of jobs over the year is consistent with the downturn and slow recovery that the national economy has been experiencing since January 2001.

AREA DEVELOPMENTS

Boise City MSA

- In February, Micron Technology laid off ten percent of its workforce, or 1,800 employees, worldwide. Mi-

cron officials cited the economic slowdown and decreased demand for DRAM as reasons for the layoff. The company laid off about 1,030 at its Boise facility. All employees impacted by the layoff received a severance package.

- ZiLOG laid off 70 employees from the Nampa semiconductor wafer factory in March, reducing its workforce to approximately 160 people. Officials at ZiLOG also announced that the Nampa location would close at some point in the future, although no news was available stating when that would occur.
- Washington Group International (WGI) began trading on NASDAQ in early March. The company also announced that it received limited notice to proceed on an engineering, procurement, and construction contract for a new 500-megawatt, combined-cycle, natural gas-fueled power plant in Fort Washington, Wisconsin. Construction is scheduled to begin later this year. WGI also announced that it would design and build a production facility for Aventis Pasteur, a large vaccine supplier. The \$77.5 million plant will be built in Swiftwater, Pennsylvania.
- Sears announced in late March that it plans to sell its credit division, which includes the credit card operation in Boise. About 1,000 employees work at the Boise facility; no immediate impact on those jobs were announced. No additional information on potential buyers has been announced.
- The new owners of the 8th Street Marketplace in downtown Boise recently announced a \$62 million renovation project for the space. Included in the plans is a new three-story building featuring a 10-screen movie theater and retail shops, a 400-space parking garage, 100,000 square-feet of office space, and the doubling of the existing retail space. Construction is scheduled to start this summer.
- Crane Creek Market opened in early March. The store is located in the former Sav-On Drug store location on Bogus Basin Road in Boise. The market features gourmet products, free-range chicken, a sushi bar, and a variety of freshly prepared food in its deli.
- Boise Corporation, formerly Boise Cascade, announced that it put 6,100 acres of its Idaho timberlands up for sale. The fifteen parcels are located near New Meadows, Smith's Ferry, Centerville, and Donnelly, and range in size from 36 acres to 1,748 acres. Bidding on the parcels began in April. Boise also cut 700 jobs throughout the company; approximately 20 jobs were affected at the corporate offices in Boise.
- In early April, the Boise City Council voted to reinstate the building permit for the Boise Tower project, a 25-story residential and commercial building

in downtown Boise. The city's planning staff had previously revoked the permit because the developer had failed to meet certain required conditions. Capital City Development Corp., the group that sold the land to the developer for the building, voted to initiate default proceedings. The developer must secure financing to meet the conditions of the agreement and permit.

- Northwest Airlines announced in mid-March that it would cut one of its daily flights between Boise and Minneapolis. The cut is part of the 12 percent reduction in flights announced by the company. A drop in passenger demand was cited as the reason for the drop in flights. Northwest will continue to operate two daily flights between Boise and Minneapolis.
- Ameritel Inns, Inc. announced in late February that it had made a franchise agreement deal with Hilton Hotels Corporation and is planning to construct a new Hilton Hotel near the Boise Towne Square Mall in Boise. Homewood Suites by Hilton will be an extended-stay hotel that features studio, one, and two-bedroom suites. Officials hope to open the hotel in spring 2005.
- Emporium announced in early February that it was going out of business. The company closed its two Boise stores and the Nampa store. No plans have been announced regarding replacements for the vacant storefronts.
- Costco moved its retail outlet from Franklin Road to a new location on Cole Road in late February. Officials at Costco state that the new warehouse is larger and offers better accessibility to customers. The new location also includes a gas station. Forty additional employees were hired as a result of the move.
- Home Depot announced in late March that it plans to open an outlet in Eagle in 2004. The 126,000-square-foot facility will be built at the intersection of State Street and Idaho 55. Between 125 and 150 employees will be hired to staff the new store. This will be Idaho's seventh Home Depot Store.
- Associated Food Stores closed its warehouse in Boise on Market Street in early December. The warehouse supplied groceries to about 95 small and independent grocery stores in Boise and surrounding rural areas; these areas will now be serviced by the company's new warehouse in Farr West, Utah. Between 65 and 70 employees were affected by the closure.
- Construction of a new retail center at McMillan and Eagle Roads in west Boise started in March. McMillan's Corner Retail Center is a three-building project that will house a Blockbuster video store, Maggie Moo's ice cream shop, a pizza shop, a hair salon, a dry cleaner, a mailing-and-shipping busi-

ness, and other retail establishments. No completion date was announced, although many of the tenants hope to open by mid-summer.

- The Chart House closed recently and remodeling has begun for Joe's Crab Shack, which will open in the space in July.
- Boise State University (BSU) started construction on a \$15.2 million residence hall project between Morrison and Driscoll Halls on the BSU campus. Two residence hall buildings will be built in addition to a seven-building apartment complex with a July 2004 projected completion date.
- Kit Manufacturing in Caldwell, which recently sold its Caldwell RV Division, announced in mid-February that the 165 employees would be hired for the new company, which is named Extreme RV's, LLC.
- Other recent business openings in the Boise City MSA include Baja Fresh in Meridian, Sniffles 'n Sneezes daycare facility in Meridian, a Mountain West Bank branch at State and Glenwood Roads in Boise, a Wells Fargo Bank branch at Eagle and McMillan Roads in Boise, a second Bryant Ideas at Glenwood and Marigold Streets in Boise, a second Glazed Over Donuts in Eagle, Genesis Fitness in Nampa, Country Care Assisted Living at The Meadows (a Guardian Home Care Center) in Nampa, Dealer Auto Auction of Idaho in Nampa, El Centro in Nampa, Ho Cong Kim Asian Market in Nampa, Starting Line Car Wash and Brew Crew Espresso in Nampa, Safe Start Driving School in Caldwell, a second Kawfee Dawgs in Caldwell, and a new Silverhawk Realty branch in Caldwell.
- In other recent business news in the Boise City MSA, Del Taco announce that it plans to open an eatery in Boise; Koppel's Browzeville closed after filing for bankruptcy protection; the proposed Cathedral Place project was rejected by the Boise Planning and Zoning Commission; Albertsons, Inc., purchased five Fleming Company supermarkets; SCP Global Technology acquired a division of Mattson Technology that will give SCP operations in Asia and Europe; TableRock Printing relocated to Eleventh and Grove Streets in Boise; Chico announced plans to move into a space in downtown Boise in May; Residence Inn announced plans to build an hotel on the southeast corner of Cole Road and Denton Street in Boise; Les Schwab began construction of a second store in Nampa; Odd Fellows and Rebekahs Home of Idaho in Caldwell closed; Mercy Medical Center in Nampa added a MRI scanner to its facility; and Valley Total Fitness announced that it would open in the former Super Thrift space in the Holly Shopping Center in Nampa.

Adams County

- The Council Community Hospital District was awarded \$38,000 over a three-year period from the Idaho Department of Health and Welfare, Rural Health Care Access Grant Program. The grant will be used to support access to primary health care services.

Boise County

- Bogus Basin Ski Resort announced in mid-February that it would raise prices and cut back its schedule for the 2003-2004 season. The poor snow year, inflation, and increased operating costs prompted the \$30.00 increase in season ticket prices and a \$3.00 increase in day passes; the ski area will also cut back to a five-day operating schedule. The resort also announced that improvements scheduled for the mountain are temporarily on hold.

Gem County

- Work on the new Gem County jail continues. The new jail is scheduled to open in May 2003.
- Gem County Commissioners voted in mid-February to give the Walter Knox Memorial Hospital (WKMh) board of directors approval to start the process of obtaining up to a \$5 million loan through the Idaho Health Facilities Authority (IHFA). The money will be used for the final stage of renovation of WKMh. This phase of renovation includes improvements in the parking lots, upgrading the fire sprinkler system, adding a new heliport, as well as relocating and/or enhancing several areas of the hospital including the laboratory, waiting rooms, restrooms, entrance, gift shop, conference/training areas, kitchen, and laundry. Construction on the project could begin in June and will take 24 months to complete.

Valley County

- A group of Idaho residents has created a consortium that is currently in negotiations with the owner of Whitetail Resort in McCall to purchase the 77-room lodge and 18-hole golf course. If the group purchases the property, the lodge would be renamed Shore Lodge and would be reopened to the public.
- In late March, three developers presented design proposals to the McCall City Council, the McCall Urban Renewal District Board, and McCall's Conference Center Citizen Committee for McCall's new conference center. One proposal for the center includes a two-story, 22,000-square-foot facility to be built north of the Holiday Inn Express on Third Street; a second developer proposed a 12,000-square-foot facility with condominiums and a 100-room hotel on five acres of land near the corner of

Hemlock and Mill Streets in downtown McCall; a third developer proposed the conference center be built on Idaho 55 across from the Whitetail Club. No decision has been made on which plan will be chosen.

- The Idaho Department of Fish and Game has proposed draining Lake Cascade in an effort to revive game fish populations and restore the lake to a popular fishing spot. Public hearings on the proposed plan were held in April. No final decision has been made on the proposal.
- The McCall Winter Carnival was held in late January and early February. Unseasonably warm temperatures worried sculptors, but cold night weather allowed the sculptors to finish the 40 sculptures in time for the judging. Large crowds attended the 10-day event that featured snow sculptures, music, a food court, parades, Monte Carlo Casino Night, hockey demonstrations, dances, plays, dog pulls, ATV races, snow sculpting contests, bingo contests, snow shoe golf, Beard/Hairy/& Sexy Leg contests, wine festival, a fun run, figure skating exhibitions, and cross country skiing. Area restaurants, stores, and lodging establishments benefited from the influx of tourists in McCall for the annual event.
- The Evergreen Theatre in McCall closed in late February. The building is owned by Lumbermen's Building Centers. By May 1, the building will house Lumbermen's display space as well as a Radio Shack franchise.
- Lake Bowl closed on April 19. Economics and lack of participants were cited as reasons for the closure.

Washington County

- Pioneer Post opened March 1 in Cambridge. The eatery is run by Susan (Suzie) Scott, and is open Monday through Friday, 11:00 a.m. to 2:00 p.m., for lunch, and Wednesday through Saturday, 5:00 to 9:30 p.m., for dinner. The lounge is open Tuesday through Sunday, 2:00 to 10:00 p.m. Catering is also available.

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MAGIC VALLEY

BLAINE, CAMAS, CASSIA, GOODING, JEROME, LINCOLN, MINIDOKA, & TWIN FALLS COUNTIES

EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate for the Magic Valley Labor Market Area (LMA) was 4.0 percent in February 2003. This is two-tenths of one percentage point lower than January 2003 and five-tenths of one percentage point lower than February 2002. The *Civilian Labor Force* was 820 persons higher from January to February 2003 and 2,130 persons higher year-over-year.

Nonfarm Payroll Jobs increased a healthy 7.9 percent year-over-year. Several sectors showed significant increases from February 2002 to February 2003. *Construction* had a strong increase of 44.2 percent year-over-year. This is attributable primarily to the Twin Falls housing market that set a record for new housing permits in 2002, breaking the previous record set in 2001. *Manufacturing*, which includes both *Food Processing* and *Other Manufacturing*, increased a total of 14.3 percent. This increase was mainly in the cheese and milk processing sectors. The sector that showed the largest decrease from February 2002 to February 2003 is *Government-Education*. The outlook for this sector is uncertain because of budget concerns and possible cutbacks in the Idaho state budget.

In general, the Magic Valley LMA is still consistently outperforming the rest of the state. The Mini-Cassia area is facing serious job losses in early 2004 due to the closure of the J.R. Simplot potato processing plant in Heyburn announced last spring and the recent McCain Foods announcement that it will be cutting 125 jobs indefinitely. The Sun Valley area has had a slightly below-average winter and its outlook depends on the duration of the war with Iraq and consumer concerns about travel safety. Consumer confidence in most of the Magic Valley remains high. The water levels seem to be adequate for the agricultural crop year, even though some markets such as potato, milk, and grain are areas of concern. However, with the existing diversity in the employment sectors, the employment outlook remains optimistic.

Magic Valley Table 1: Labor Force & Employment
Twin Falls, Jerome, and Gooding Counties

	Feb 2003*	Jan 2003	Feb 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	52,630	51,810	50,500	1.6	4.2
Unemployment	2,090	2,200	2,280	-5.0	-8.3
% of Labor Force Unemployed	4.0	4.2	4.5		
Total Employment	50,540	49,610	48,220	1.9	4.8
Unadjusted					
Civilian Labor Force	51,360	50,280	51,880	2.1	-1.0
Unemployment	2,600	2,660	2,170	-2.3	19.8
% of Labor Force Unemployed	5.1	5.3	4.2		
Total Employment	48,760	47,620	49,710	2.4	-1.9
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs**	40,120	40,780	37,190	-1.6	7.9
Goods-Producing Industries	7,900	7,930	6,510	-0.4	21.4
Natural Resources & Mining	30	30	40	0.0	-25.0
Construction	2,250	2,180	1,560	3.2	44.2
Manufacturing	5,610	5,730	4,910	-2.1	14.3
Food Manufacturing	3,680	3,820	3,150	-3.7	16.8
Other Manufacturing	1,930	1,910	1,760	1.0	9.7
Service-Producing Industries	32,230	32,850	30,680	-1.9	5.1
Trade, Transportation & Utilities	9,810	9,870	9,530	-0.6	2.9
Wholesale Trade	1,850	1,830	1,750	1.1	5.7
Retail Trade	5,800	5,790	5,540	0.2	4.7
Utilities	210	210	180	0.0	16.7
Transportation & Warehousing	1,940	2,040	2,070	-4.9	-6.3
Information	500	490	480	2.0	4.2
Financial Activities	1,680	1,670	1,540	0.6	9.1
Professional & Business Services	5,080	5,110	3,940	-0.6	28.9
Educational & Health Services	3,070	3,050	2,960	0.7	3.7
Leisure & Hospitality	3,450	3,580	3,120	-3.6	10.6
Other Services	1,490	1,450	1,340	2.8	11.2
Government Administration	3,030	3,500	3,900	-13.4	-22.3
Government Education	4,130	4,120	3,880	0.2	6.4

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

AREA DEVELOPMENTS

Twin Falls County

- The Twin Falls Chamber of Commerce awarded its prestigious Curtis T. Eaton Award for Business Excellence to the proprietor of Team Con Paulos. The chamber stated that Con Paulos and his team exemplify business character and excellence. Mr. Paulos, owner of two automobile dealerships in the Magic Valley, is an essential partner in economic development in the Magic Valley and is a citizen partner with the Idaho Department of Commerce. He also serves on the Governor's 2020 Blue Ribbon Task Force and has been an effective and successful advocate for the Magic Valley.
- Minneapolis-based Best Buy, Inc. announced plans to open a new store in Twin Falls in the fall of 2003. Real estate negotiations are continuing, and a final site has not been disclosed. The 30,000-square-foot store will

employ between 80 and 150 full- and part-time people. Best Buy specializes in consumer electronics, personal computers, entertainment software, and appliances. Best Buy has a presence in Twin Falls with the Sam Goody store located in the Magic Valley Mall.

- Sioux Falls, South Dakota, based Summit Group, Inc. plans to build a 75-room hotel on the corner of Pole Line Road and Fillmore Streets in Twin Falls. The company plans to begin construction in July 2003 and open in April 2004. The hotel will include such amenities as a swimming pool, spa, exercise room, and meeting and banquet facilities. The Summit Group is currently negotiating with Hilton Hotels Corporation to use the Hampton Inn & Suites franchise for the planned hotel. The hotel is expected to hire approximately 20 full- and part-time employees.
- The City of Buhl has begun its \$2 million downtown revitalization project. The project calls for tearing up and rebuilding downtown streets, sidewalks, curbs, and gutters. New street lights, benches, garbage cans, more off-street parking, attractive entrances to the city, restoring historic building fronts and other improvements will come at a later date. The initial work is expected to last through mid-June.

Blaine, Camas, Gooding, Jerome, and Lincoln Counties

- WOW Logistics held its grand opening and ribbon cutting at its new facility in Jerome in late January. Among those attending and speaking were Jerome Mayor Charles Correll and Idaho Governor Dirk Kempthorne. Tom Oswald, Chief Financial Officer of WOW Logistics, and Bob Rossi, Director of the WOW Development Group, announced that the new 232,650-square-foot warehouse was filling rapidly and that WOW was planning a 70,000-square-foot expansion project immediately. WOW employs 12-15 workers. Another five to ten new workers may be hired after the expansion.
- A new Sonic Drive-In has opened on South Lincoln in Jerome near Wal-Mart at 2700 South Lincoln. The new Sonic will employ 35 full- and part-time workers. Sonic specializes in made-to-order fast food and specialty menu items, and is unique for its carhop service.
- The Sawtooth National Forest's Ketchum Ranger District has approved Sun Valley's plan to build a ski and snowboard halfpipe on the left side of Lower Warm Springs below Race Arena on Bald Mountain. Skiers and snowboarders use halfpipes to perform aerial maneuvers and tricks. Crews will excavate the area for the halfpipe this summer. Approximately 1.8 acres of ski run will be graded into the halfpipe foundation. The dirt walls will be between 3 and 7 feet above the ground level and excavated between 4 and 9 feet below the ground level. It is expected that this halfpipe will be an excellent attraction for the resort and result in attracting more skiers and snowboarders.

Cassia and Minidoka Counties

- The Burley Wal-Mart, which was recently expanded into a Supercenter, held its grand opening in March.

The expansion more than doubled the size of the existing store and includes expanded products and services, such as groceries, a beauty salon, and a new McDonald's restaurant. McDonald's is hiring approximately 20 full- and part-time employees and the beauty salon will hire five to 10 workers. Wal-Mart hired an additional 125 workers, bringing its staff total to approximately 290 workers.

- Brian Tibbets has been hired as the new community development specialist by the City of Burley. Tibbets will work with business owners to continue the downtown revitalization project and will also focus on the centennial celebration in 2007. Mr. Tibbets is a graduate of Utah State University. He and his wife Keri have two children.
- McCain Foods announced that it will eliminate one full shift from its operation at the Burley potato processing plant, resulting in the layoff of 125 workers beginning June 20. McCain has been running a shift schedule where employees work seven 12-hour shifts per pay period. The company will be changing to three, eight-hour shifts, which will cut one full shift from the plant's schedule. The company cited a deteriorating potato market as the reason for the cutback. The company expressed hope that the market will soon improve and the layoffs will be temporary. The effect on farmers' potato contracts had yet to be determined, but with the announced Simplot closure in 2004 and the McCain layoff, there will be some serious concerns about the number and prices of contracts offered. The potato acreage affected by these changes spreads from Power to Elmore Counties in Southern Idaho.
- *Farm Times*, a monthly agricultural newspaper circulating in Idaho and other Western states, has been sold to the *Times-News* of Twin Falls. The *Farm Times* was located in Rupert. The *Times-News* made the purchase on behalf of its parent company, Lee Publications, Inc. of Davenport, Iowa. *Farm Times* printed a monthly agricultural periodical and also printed *Beef Times*. The *Times-News* plans to combine *Farm Times* with its own publication *Ag Weekly*. The combined publication will have a circulation of about 33,000 readers in Idaho and surrounding states. *Ag Weekly* will continue publishing weekly, but once a month will include an expanded publication with selections of familiar *Farm Times* farm columnists and feature writers, as well as commodity reports on crops grown elsewhere in the region. The purchase affected six employees in the Mini-Cassia area who will be invited to apply at *Ag Weekly*, although employment agreements were not included in the sale.

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SOUTHEAST IDAHO

BANNOCK, BEAR LAKE, BINGHAM, CARIBOU, FRANKLIN, ONEIDA, & POWER COUNTIES

EMPLOYMENT TRENDS

The Pocatello Metropolitan Statistical Area's (MSA) seasonally adjusted unemployment rate was 5.2 percent in February 2003, a drop of four-tenths of a percentage point from the January 2003 revised rate of 5.6 percent, as shown in Southeast Idaho Table 1. A major input into estimating the unemployment rate is a survey of households. The survey reported a 2 percent increase in the number of people employed in February. This increase, along with adjustments made in the benchmarking process from 2002, contributed to the unemployment rate reduction. The MSA's February unemployment rate fell more than a full percentage point below the 6.1 percent rate experienced one year ago. The area's unemployment rate was one-tenth of a percentage point lower than the state rate of 5.3 percent in February.

In February 2003 the number of *Nonfarm Payroll Jobs* increased 1.2 percent to 33,050. The 1.2 percent increase of 390 Nonfarm jobs occurred almost entirely in *Government Education* because the number of employees at Idaho State University fluctuated with the break between the winter and spring semesters. In January while Idaho State University was between winter and spring semesters, jobs provided to students in the work-study program stopped and restarted when the new semester began. Those jobs began after the survey week in January and are not counted until February.

The subtle change that occurred in nonfarm jobs this February is typical for nearly every February with the exception of *Construction*, where a drop in the number of jobs occurs more often than an increase.

A slight increase in *Construction* (0.6 percent) was outpaced by a slight decrease in *Manufacturing* (1.1 percent), which led to a small decrease (0.5 percent) in the number of jobs in the *Goods-Producing Industries*. The completion of a new IHOP restaurant in Pocatello and continued progress on the performing arts center at Idaho State University maintained construction jobs during February.

Southeast Idaho Table 1: Labor Force & Employment
Pocatello City MSA (Bannock County)

	Feb 2003*	Jan 2003	Feb 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	40,250	38,390	39,520	4.8	1.8
Unemployment	2,100	2,150	2,510	-2.3	-16.3
% of Labor Force Unemployed	5.2	5.6	6.3		
Total Employment	38,150	36,240	37,010	5.3	3.1
<i>Unadjusted</i>					
Civilian Labor Force	41,030	38,790	40,060	5.8	2.4
Unemployment	2,500	2,490	2,950	0.4	-15.3
% of Labor Force Unemployed	6.1	6.40	7.4		
Total Employment	38,530	36,300	37,110	6.1	3.8
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	33,050	32,660	32,750	1.2	0.9
<i>Goods-Producing Industries</i>	4,330	4,350	4,080	-0.5	6.1
Natural Resources & Mining	10	10	10	0.0	0.0
Construction	1,660	1,650	1,410	0.6	17.7
Manufacturing	2,660	2,690	2,660	-1.1	0.0
Food Manufacturing	430	430	480	0.0	-10.4
Fabricated Metal Product Manufacturing	140	140	120	0.0	16.7
Machinery Manufacturing	40	40	30	0.0	33.3
Other Manufacturing	2,050	2,080	2,030	-1.4	1.0
<i>Service-Producing Industries</i>	28,720	28,310	28,670	1.4	0.2
Trade, Transportation & Utilities	6,710	6,700	6,550	0.1	2.4
Wholesale Trade	1,060	1,050	1,040	1.0	1.9
Retail Trade	4,390	4,390	4,260	0.0	3.1
Utilities	50	50	50	0.0	0.0
Transportation & Warehousing	1,210	1,210	1,200	0.0	0.8
Information	680	680	660	0.0	3.0
Financial Activities	1,720	1,740	1,780	-1.1	-3.4
Professional & Business Services	3,320	3,320	3,340	0.0	-0.6
Educational & Health Services	2,710	2,690	2,980	0.7	-9.1
Leisure & Hospitality	3,210	3,200	3,110	0.3	3.2
Other Services	1,310	1,300	1,180	0.8	11.0
Government Administration	4,250	4,260	3,470	-0.2	22.5
Government Education	4,810	4,420	5,600	8.8	-14.1

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

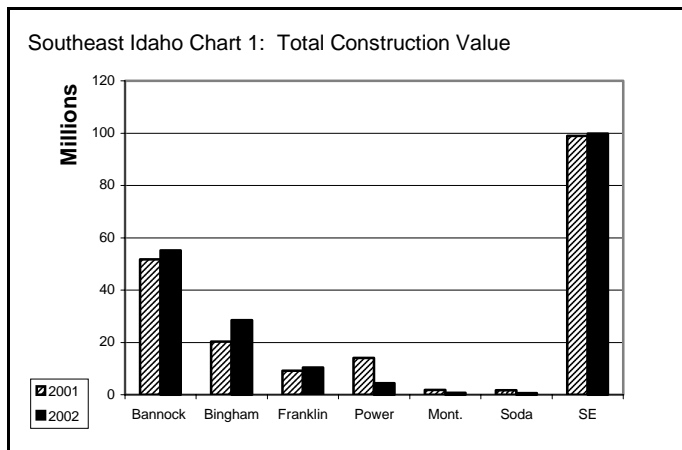
In the *Service-Producing Industries* increases in *Government Education* (8.8 percent), *Wholesale Trade* (1.0 percent), *Education and Health Services* (0.7 percent), *Leisure and Hospitality* (0.3 percent) and *Other Services* (0.8 percent) offset reductions in the *Goods-Producing Industries*.

AREA CONSTRUCTION 2002

Construction activity in Southeast Idaho increased slightly (0.9 percent) in 2002 over 2001, according to the December 2002 Wells Fargo Bank's Idaho Construction Report. In Southeast Idaho, construction projects totaled \$99,868,894, while in Idaho construction projects totaled \$2,073,813,732.

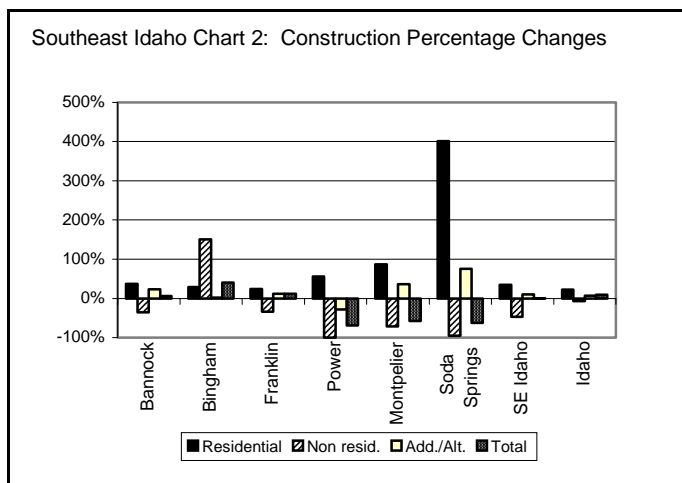
Southeast Idaho Chart 1: Total Construction Value, shows three of the six reporting areas in Southeast Idaho—Bannock (6.5 percent), Bingham (40.6 percent) and Franklin (12.1 percent) Counties—experienced significant increases

while Power County (-68.6 percent), Montpelier City (-57.1 percent) and Soda Springs City (-62.8 percent) experienced large decreases. Compared with Idaho (9.8 percent), construction values in Southeast Idaho fell nearly 9 percentage points behind. However, Bingham and Franklin Counties'



construction growth rates surpassed Idaho's by a large margin.

Southeast Idaho Chart 2: 2001 - 2002 Construction, shows the percentage change in the type of construction by area. Every area in Southeast Idaho experienced Residential Construction growth and every area exceeded the state-wide Residential Construction growth rate. Non-residential Construction declined in every area except Bingham County. The large percentage declines in Non-residential Construction outpaced increases in Residential Construction lowering the overall growth rate of construction for the year compared to previous years. In most areas Additions, Alterations, and Repairs experienced significant growth rates indicating that individuals and businesses continued to invest in their existing properties despite the

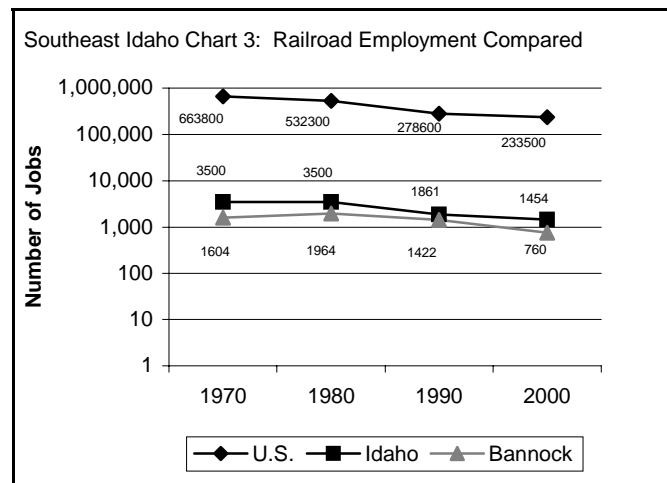


slow economic recovery, job reductions throughout the area, and the possibility of war.

SPECIAL TOPIC

Railroad Jobs

It is generally believed that railroad employment in Bannock County has declined while railroad employment in the U.S. and in Idaho has remained constant or grown.



However, a look at the railroad industry shows a trend of lower overall railroad employment. Several economic events have led to job reductions in the railroad industry as a whole and certainly to the railroad industry in Idaho and Bannock County: deregulation, geography, technology, reduction or elimination of passenger service, and reduction in rail traffic in general.

In the 1980's, deregulation allowed the merger of railroads, which in turn changed the geography of those railroad systems. Technology advancements, as in other industries, have developed machines and computers that perform tasks formerly done by people. Elimination of passenger services has reduced railroad jobs formerly needed to take care of those passengers, and a decrease of railroad business has meant fewer cars and trains move through the area.

According to the U.S. and Idaho Departments of Labor, railroad employment has declined since its peak in the 1940's. By 1970, the number of railroad jobs in the U.S., Idaho, and Bannock County had dropped by approximately 50 percent. Southeast Idaho Chart 3: Railroad Employment, compares the change in railroad jobs in the U.S., Idaho, and Bannock County from 1970 to 2000. The number of railroad jobs in the U.S. declined by 64.8 percent since 1970, a loss of 430,000 jobs. During the same thirty-year period, the number of railroad jobs in Idaho declined 58.5 percent, a loss of over 2,000 jobs. In Bannock County, the number of railroad jobs fell 52.6 percent from 1970 to 2000, a loss of 844 jobs.

The railroad's relative importance to the economy differs between the U.S., Idaho, and Bannock County. Southeast Idaho Chart 4: Percentage of nonfarm Jobs in the Railroad Sector (on page 27), shows that railroad jobs in Bannock County represent a much larger share of total nonfarm jobs than in Idaho and the U.S. In Bannock County, railroad jobs accounted for 9 percent of all nonfarm jobs in 1970 and by 2000 that percentage had fallen to 2.3 percent. Between 1990 and 2000, railroad jobs as a percent of all nonfarm jobs fell 3.6 percent, the largest margin decrease of any decade. This reflects the effect the merger between the Union Pacific and Southern Pacific had on the county. The

Article continued on page 42



NORTHEAST IDAHO

BONNEVILLE, BUTTE, CLARK, CUSTER, FREMONT, JEFFERSON, LEMHI, MADISON, & TETON COUNTIES

EMPLOYMENT TRENDS

February's seasonally-adjusted unemployment rate for the Bonneville Labor Market Area (LMA) decreased two-tenths of a percentage point over the month to 3.7 percent as seen in Northeast Table 1. This was a decrease of five-tenths of a percentage point from February 2002. Bingham and Bonneville Counties each decreased three-tenths of a percentage point at 4.4 and 3.3 percent, respectively. Butte (5.3 percent) and Jefferson (3.9 percent) Counties both increased—four-tenths of a percentage point and one-tenth of a percentage point, respectively. Year-over-year, Bingham, Bonneville, and Jefferson Counties all saw decreases of four-tenths of a percentage point or more. Butte County was the only county to see an increase at one percentage point. Butte County experienced an increase of 15 unemployed persons and a decrease of 10 in the *Civilian Labor Force*.

Other counties in Northeast Idaho had little change over the month, with the exception of Clark County, which increased nine-tenths of a percentage point and Fremont County, which decreased seven-tenths of a percentage point. Custer County experienced the largest decrease year-over-year from 10.5 percent to 7.4 percent. The Thompson Creek Mine closure had an effect on last year's unemployment rate. Clark and Lemhi Counties both decreased substantially year-over-year at 1.4 percentage points and 1.1 percentage points, respectively. (See State Table 1 on page 3 for county labor force rates.)

Jobs by Place of Work show that total nonfarm jobs decreased by 160 over the month with *Service-Producing Industries* losses overriding gains in *Goods-Producing Industries*. The industry that showed the largest gain (60) was *Government Education* as spring semesters started up in January and fed into the need for more employment by February. All significant losses were seen in the *Service-Producing Industries* with 110 from

Northeast Idaho Table 1: Labor Force & Employment
Bonneville, Bingham, Butte, and Jefferson Counties

	Feb 2003*	Jan 2003	Feb 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	82,910	84,202	83,770	-1.5	-1.0
Unemployment	3,090	3,307	3,520	-6.6	-12.2
% of Labor Force Unemployed	3.7%	3.9%	4.2%		
Total Employment	79,820	80,895	80,250	-1.3	-0.5
Unadjusted					
Civilian Labor Force	80,750	82,310	82,330	-1.9	-1.9
Unemployment	3,810	3,970	4,150	-4.0	-8.2
% of Labor Force Unemployed	4.7%	4.8%	5.0%		
Total Employment	76,940	78,340	78,180	-1.8	-1.6
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	60,990	61,150	60,100	-0.3	1.5
Goods-Producing Industries	9,030	8,960	8,550	0.8	5.6
Natural Resources & Mining	50	50	50	0.0	0.0
Construction	3,750	3,710	3,440	1.1	9.0
Manufacturing	5,230	5,200	5,060	0.6	3.4
Food Manufacturing	2,690	2,730	2,880	-1.5	-6.6
Fabricated Metal Product Manufacturing	290	290	240	0.0	20.8
Machinery Manufacturing	470	440	390	6.8	20.5
Other Manufacturing	1,780	1,740	1,550	2.3	14.8
Service-Producing Industries	51,960	52,190	51,550	-0.4	0.8
Trade, Transportation & Utilities	13,850	13,920	14,120	-0.5	-1.9
Wholesale Trade	4,750	4,710	5,050	0.8	-5.9
Retail Trade	7,280	7,390	7,460	-1.5	-2.4
Utilities	100	100	100	0.0	0.0
Transportation	1,720	1,720	1,510	0.0	13.9
Information	830	870	930	-4.6	-10.8
Financial Activities	1,970	1,950	2,050	1.0	-3.9
Professional & Business Services	11,350	11,470	11,190	-1.0	1.4
Educational & Health Services	6,210	6,180	5,750	0.5	8.0
Leisure & Hospitality	4,530	4,670	4,500	-3.0	0.7
Other Services	2,250	2,220	2,240	1.4	0.4
Government Education	5,140	5,080	5,150	1.2	-0.2
Government Administration	5,830	5,830	5,620	0.0	3.7

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

Retail Trade (General Merchandise and Building & Garden Supplies sectors), 120 from Professional and Business Services (Administrative & Support & Waste sector), and 140 from Leisure & Hospitality (Food Services & Drinking Places sector).

Year-over-year, the LMA experienced a total increase of 890 jobs in spite of the national and state economies. The increase came almost equally from both the *Goods-Producing Industries* and the *Service-Producing Industries*. *Construction* showed a notable increase of 310 as the area continues to thrive with new developments, both commercially and residentially. *Educational & Health Services* increased 460 jobs with equal participation from the *Ambulatory Health Care Services* and *Hospitals* sectors. *Government Administration* increased 210 jobs in *Local Administration*. Decreases were seen

in *Food Manufacturing (Fruit & Vegetable Preserving & Special Foods)*, *Wholesale Trade (Nondurable Goods)*, and *Retail Trade* (mostly *General Merchandise* stores). Both *Food Manufacturing* and *Wholesale Trade* are related to potato activity in a month when temperatures can drop so low that transportation of the commodity is restricted, limiting working hours in the day.

AREA DEVELOPMENTS

- The Department of Energy (DOE) named a new leader for the Idaho National Engineering & Environmental Laboratory (INEEL) in March. Elizabeth Sellers, currently the manager at DOE's National Nuclear Security Administration in Kansas City, was chosen after a year-long search. During this year, INEEL's mission changed, so the qualifications of the job changed mid-stream. Sellers, who will oversee day-to-day operations at the INEEL, has experience in environmental cleanup and national security programs. DOE and Sellers will now look for a deputy manager to replace Warren Bergholz who recently retired from the position.

Bonneville County

- Two established businesses experienced tragedy within the past two months in Idaho Falls. BMC West, a building supply company and lumberyard, lost its retail sales/office building at the end of February in a fire. Fortunately, the lumberyard was saved and employees were able to operate out of the sales building east of the building that was destroyed. The company will either rebuild or change locations. Damage was estimated to be at least \$1.3 million. Bubba's Bar-B-Que caught fire at the end of January during a prime dinner time. The fire damaged a few sides and some of the roof of the building. The owners have already started rebuilding and plan to reopen Memorial Day weekend. No one was injured in either fire.
- The Tautphaus Park Zoo in Idaho Falls received a \$400,000 donation from ALSAM Foundation, a Boise-based philanthropic group. The money will help the zoo expand its Primate Discovery Center (monkeys and apes) and its otter exhibit. Construction is expected to be completed in 2004.
- A second AutoZone, Inc. will open in Idaho Falls at the corner of Woodruff Avenue and Seventeenth Street. The auto parts retailer will start construction in May where tenants Clear Channel Communications and Herbs for Health (along with others) now exist. The current retail complex will be torn down and those business will relocate elsewhere in the city. AutoZone, Inc. offers free testing for batteries, starters, alternators, voltage regulators, and control modules. Used engine oil can be taken there for re-

cycling. The store also offers a Loan-A-Tool program for customers who need specialty tools for one-time repair jobs. The company's other Idaho Falls location is at 1562 West Broadway Avenue.

- Walgreens in Idaho Falls will get new neighbors at its Holmes Avenue and Seventeenth Street location. Rent-A-Center, which specializes in renting furniture and household items, and a check-cashing service will be the first two tenants. Construction will begin as soon as permits have been issued.

Madison County

- North America's largest franchised lawn-care company, Weed Man, is opening a location in Rexburg. Jerry Merrill, who currently runs Merrill Quality Landscapes and U.S. Lawns and Nite Time Décor, will provide services to both residential and commercial customers from Shelley to Ashton with his Weed Man franchise. The company started in Toronto in 1970 and currently has 135 unit franchises in the United States and 133 unit franchises in Canada.
- Joel Huber and Greg Gasper opened Upper Valley Lock and Safe at 20 North First West in Rexburg. The locksmith shop is located across the street from Broulim's in the garage of the rock house located at that address. The owners hope to attract foot traffic from university students, along with steady resident clients as the town continues to expand.

Teton County

- Warmth Wear, makers of adult footed pajamas and other items, has grown substantially since sisters started making them in the basement of their mother's Newdale home in 1996. The company moved from the basement to an apartment above a Teton convenience store when the Internet proved to be a good marketing avenue. Most of the product is sold to customers in the eastern and the southern parts of the United States, and the majority of the customers are men. The website, www.warmthwear.com, includes photos and descriptions of the products, such as drop-seaters or "mooners" and "cozies" styles.

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NAICS HAS ARRIVED

After several articles in the last few months anticipating the conversion to the *North American Industry Classification System* (NAICS), it is finally happening. The delay in the February and March issue of the *Idaho Employment* was due to the extra time it has taken in developing current industry employment information for the state and the labor market areas. The data in State Table 3 on page 6 and in the various area tables elsewhere in this newsletter are now published using NAICS. The total employment number is still called *Nonfarm Payroll Jobs* and an individual industry is still an *Industry*, but industry groupings and coding scheme hierarchy have different names.

This article is presented in two parts. The first part provides a basic definition of each industry group that is published in the state table. The area tables have data for the same groups, but not with as much detail as the state table due to the Idaho Department of Labor's disclosure policy. The second part is a series of tables, starting on page 26, which provide lists of employers in each industry group by geographic area. These employers represent a sample of each industry. However, they are not always the largest employers or located in the largest county within the area. The area used is the entire labor market area and not just the few counties for which nonfarm data is published monthly. Annual average labor force and employment numbers for each region also are provided.

Nonfarm Payroll Jobs are defined as the total nonfarm jobs by place of work for the week which includes the 12th of the month. The total includes both jobs in the public and private sectors.

Natural Resources in Idaho is defined as businesses involved in *Logging* and *Mining*. This is a new classification. The *Logging* industry is now classified as an activity in *Agriculture*. However, due to its importance in Idaho's economy, we will include the employment in this industrial sector in our *Natural Resources* sector.

Logging is comprised of establishments primarily engaged in one or more of the following: (1) cutting timber; (2) cutting and transporting timber; and (3) producing wood chips in the field.

Mining is comprised of establishments that extract naturally occurring oil, gas, coal, metal ores, and nonmetallic ores. The major mining activity in Idaho has been

metal ore mining in North Idaho. The nonmetallic mining activity includes stone quarry, phosphate rock mining for fertilizer, and sand and gravel for construction. The *Mining* sector distinguishes two basic activities: mine operation and mining support activities.

Metal Ore Mining comprises establishments primarily engaged in developing mine sites or mining metallic minerals. The primary metals mined in Idaho are gold, silver, lead, and zinc.

Construction comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems). This sector has been divided into three subsectors: Construction of Buildings—residential and commercial buildings; Heavy and Civil Engineering Construction—roads, bridges, and other establishments involved in the construction of engineering projects; and Specialty Trade Contractors—

painting, plumbing, electrical, framing, site preparation, and other specialty activities needed in the construction of all types of buildings.

Utilities comprises establishments engaged in the provi-

sion of utility services such as electric power, natural gas, steam supply, water supply, and sewage removal establishments. Sanitary services are excluded and are classified as part of *Administrative & Waste Services*.

Manufacturing is comprised of establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products.

Establishments in the **Manufacturing** sector are often described as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment. However, establishments that transform materials or substances into new products by hand or in the worker's home, and those engaged in selling to the general public products made on the same premises from which they are sold (such as bakeries, candy stores, and custom tailors) may also be included in this sector. The subsectors in the **Manufacturing** sector generally reflect distinct production processes related to material inputs, production equipment, and employee skills.

Industries in the *Food Manufacturing* subsector transform livestock and agricultural products into products for intermediate or final consumption. The industry groups are distinguished by the raw materials processed

NAICS

into food products—potatoes, sugar beets, dairy, fish, etc. The food products manufactured in these establishments are typically sold to wholesalers or retailers for distribution to consumers, but establishments primarily engaged in retailing bakery and candy products made on the premises not for immediate consumption are included. *Fruit & Vegetable Preserving & Specialty Food* includes (1) establishments that freeze food and (2) those that use preservation processes, such as pickling, canning, and dehydrating.

Industries in the *Wood Product Manufacturing* subsector manufacture wood products, such as lumber, plywood, veneers, wood containers, wood flooring, wood trusses, manufactured homes (i.e., mobile home), and prefabricated wood buildings. The production processes of *Wood Product Manufacturing* include sawing, planing, shaping, laminating, and assembling of wood products. The *Sawmills & Wood Preservation* sector are comprised of establishments whose primary production process begins with logs that are transformed into boards, dimension lumber, beams, timbers, poles, ties, shingles, shakes, siding, and wood chips.

Industries in the *Paper Manufacturing* subsector make pulp, paper, or converted paper products.

Industries in the *Printing & Related Support Activities* subsector print products such as newspapers, books, periodicals, business forms, greeting cards, and other materials, and perform support activities such as book-binding, plate making services, and data imaging. When publishing and printing (for example a newspaper) are done at the same facility, the establishment is classified in *Information*, even if the receipts for printing exceed those for publishing.

The *Chemical Manufacturing* subsector is based on the transformation of organic and inorganic raw materials by a chemical process and the formulation of products.

Industries in the *Fabricated Metal Product Manufacturing* subsector transform metal into intermediate or end products, other than machinery, computers and electronics, and metal furniture, or treating metals and metal formed products fabricated elsewhere. Important fabricated metal processes are forging, stamping, bending, forming, and machining used to shape individual pieces of metal; and other processes, such as welding and assembling, used to join separate parts together. The manufacturing performed in the *Fabricated Metal Product Manufacturing* subsector begins with manufactured metal shapes. The establishments in this sector further fabricate the purchased metal shapes into a product.

Industries in the *Machinery Manufacturing* subsector create end products that apply mechanical force, for example, the application of gears and levers to perform work. Some important processes for the manufacture of

machinery are forging, stamping, bending, forming, and machining that are used to shape individual pieces of metal. Processes such as welding and assembling are used to join separate parts together. Although these processes are similar to those used in metal fabricating establishments, machinery manufacturing is different because it typically employs multiple metal forming processes in manufacturing the various parts of the machine. These establishments specialize in making machinery designed for particular applications. Thus, design is considered to be part of the production process for the purpose of implementing NAICS.

Industries in the *Computer & Electronic Product Manufacturing* subsector group include establishments that manufacture computers, computer peripherals, communications equipment, and similar electronic products, and establishments that manufacture components for such products. The *Computer & Electronic Product Manufacturing* industries have been combined in the hierarchy of NAICS because of the economic significance they have attained. Their rapid growth suggests that they will become even more important to the economies and, in addition, their manufacturing processes are fundamentally different from the manufacturing processes of other machinery and equipment.

Industries in the *Transportation Equipment Manufacturing* subsector produce equipment for transporting people and goods. Transportation equipment is a type of machinery rather than a mode of transportation. Establishments in this subsector utilize production processes similar to those of other machinery manufacturing establishments. However, the assembly of components and subassemblies, and their further assembly into finished vehicles, tend to be a more common production process in this subsector than in the *Machinery Manufacturing* subsector.

The **Wholesale Trade** sector comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The merchandise described in this sector includes the outputs of agriculture, mining, manufacturing, and certain information industries, such as publishing. The wholesaling process is an intermediate step in the distribution of merchandise. This sector comprises two main types of wholesalers: merchant wholesalers that sell goods on their own account and business-to-business electronic markets, agents, and brokers who arrange sales and purchases for others, generally for a commission or fee.

Industries in the *Wholesalers, Durable Goods* subsector sell capital or durable goods to other businesses. Durable goods are new or used items generally with a normal life expectancy of three years or more. Durable goods merchant wholesale trade establishments are engaged in wholesaling products such as motor vehicles,

furniture, construction materials, machinery and equipment (including household-type appliances), metals and minerals (except petroleum), sporting goods, toys and hobby goods, recyclable materials, and parts.

Industries in the *Wholesalers, Nondurable Goods* subsector sell nondurable goods to other businesses. These are items generally with a normal life expectancy of less than three years. Nondurable goods merchant wholesale trade establishments are engaged in wholesaling products, such as paper and paper products, chemicals and chemical products, drugs, textiles and textile products, apparel, footwear, groceries, farm products, petroleum and petroleum products, alcoholic beverages, books, magazines, newspapers, flowers and nursery stock, and tobacco products.

Business-to-business electronic markets, agents, and brokers primarily engaged in wholesaling, generally on a commission or fee basis, are included in the *Wholesale Electronic Markets & Agents & Brokers* subsector. Employment in this sector is not published because it is considered to be too small and difficult to define.

The **Retail Trade** sector comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The retailing process is the final step in the distribution of merchandise. This sector comprises two main types of retailers: store and nonstore retailers. Retail stores have extensive displays of merchandise and use mass media advertising to attract customers. These include establishments such as furniture stores, food and beverage stores, office supply stores, computer and software stores, building materials dealers, health care stores, sporting good stores, automotive dealers, and general merchandise stores. Nonstore retailers reach customers and market merchandise with methods, such as the broadcasting of "infomercials," the broadcasting and publishing of direct-response advertising, the publishing of paper and electronic catalogs, door-to-door solicitation, in-home demonstration, selling from portable stalls (street vendors, except food), and distribution through vending machines. These establishments include home heating oil dealers and home delivery newspaper routes.

Industries in the *Motor Vehicle & Parts Dealers* subsector retail motor vehicle and parts merchandise from fixed point-of-sale locations. Industries in the *Building Material & Garden Equipment & Supplies Dealers* subsector retail new building material and garden equipment, and supply merchandise to retailers from fixed point-of-sale locations. Industries in the *Food & Beverage Stores* subsector usually retail food and beverage merchandise from fixed point-of-sale locations. Industries in the *Gasoline Stations* subsector group establishments retail automotive fuels (e.g., gasoline, diesel fuel, gasohol) and automotive oils, and retail these products in

combination with convenience store items. Industries in the *General Merchandise Stores* subsector retail new general merchandise from fixed point-of-sale locations. Establishments in this subsector are unique in that they have the equipment and staff capable of retailing a large variety of goods from a single location.

The **Transportation & Warehousing** sector comprises establishments that provide transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation. The modes of transportation are air, rail, water, road, and pipeline. This sector has three basic types of activities: mode of transportation, warehousing and storage, and support activities. Within these three, there are additional subsectors for passenger transportation for scenic and sightseeing purposes, postal services, and courier services. Warehousing establishments in this sector do not sell the goods.

Industries in the *Rail Transportation* subsector provide rail transportation of passengers and/or cargo using railroad rolling stock. Scenic and sightseeing rail transportation and street railroads, commuter rail, and rapid transit are not included in this subsector but are included in *Scenic & Sightseeing Transportation*, and *Transit & Ground Passenger Transportation*, respectively. Although these activities use railroad rolling stock, they differ because passengers traveling on sightseeing and scenic railroads start and end their trip at the same location. Commuter railroads operate in a manner more consistent with local and urban transit and are often part of integrated transit systems.

Industries in the *Truck Transportation* subsector provide over-the-road transportation of cargo using motor vehicles such as trucks and tractor-trailers. This subsector is subdivided into general freight trucking and specialized freight trucking. Each of these industry groups is further subdivided based on distance traveled. Local trucking establishments primarily carry goods within a single metropolitan area and its adjacent nonurban areas. Long distance trucking establishments carry goods between metropolitan areas.

The *Information* sector is a new industry concept. It is comprised of establishments engaged in the following processes: (a) producing and distributing information and cultural products, (b) providing the means to transmit or distribute these products as well as data or communications, and (c) processing data. The main components of this sector are the publishing industries, including software publishing, the motion picture and sound recording industries, the broadcasting and telecommunications industries, and the information services and data processing industries. In developing NAICS, the transformation of information into a commodity that is produced and distributed by a number of growing industries raised a difficult issue. These activities were formerly classified throughout the existing national classifi-

cations. For example, traditional publishing was in manufacturing, broadcasting was in communications, software production was in business services, film production was in amusement services, and so forth.

The distribution modes for information commodities may either eliminate the necessity for traditional manufacture, or reverse the conventional order of manufacture-distribute: A newspaper distributed online, for example, can be printed locally or by the final consumer. Similarly, it is anticipated that packaged software, which today is mainly bought through the traditional retail channels, will soon be available mainly online. The NAICS Information sector is designed to make such economic changes transparent as they occur.

Many of the industries in the NAICS *Information* sector are engaged in producing or in distributing products (other than distribution by traditional wholesale and retail methods) protected by copyright law. Broadcasting and telecommunications industries, and information providers and processors are also included in the *Information* sector because their technologies are so closely linked to other industries in the *Information* sector.

Industries in the *Telecommunications* subsector include establishments providing communications and the services related to that activity. The *Telecommunications* subsector is primarily engaged in operating, maintaining, and/or providing access to facilities for the transmission of voice, data, text, sound, cable programming, and full motion picture video. A transmission facility may be based on a single technology or a combination of technologies.

The *Finance & Insurance* sector comprises establishments primarily engaged in financial transactions and/or in facilitating financial transactions. Three principal types of activities are identified: (1) raising funds by taking deposits and/or issuing securities and, in the process, incurring liabilities; (2) pooling of risk by underwriting insurance and annuities; and (3) providing specialized services facilitating or supporting financial intermediation, insurance, and employee benefit programs. The subsectors, industry groups, and industries within the NAICS *Finance & Insurance* sector are defined on the basis of their unique production processes. The way in which these establishments acquire and allocate financial capital, their source of funds, and the use of those funds provides a third basis for distinguishing characteristics of the production process.

The *Finance & Insurance* sector has been defined to encompass establishments primarily engaged in financial transactions; that is, transactions involving the creation, liquidation, or change in ownership of financial assets or in facilitating financial transactions. Financial industries are extensive users of electronic means for facilitating the verification of financial balances, authorizing transactions, transferring funds to and from transactors'

accounts, notifying banks (or credit card issuers) of the individual transactions, and providing daily summaries. Since these transaction processing activities are integral to the production of finance and insurance services, establishments that principally provide a financial transaction processing service are classified to this sector, rather than to the data processing industry in the *Information* sector.

The **Real Estate & Rental & Leasing** sector comprises establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets, and establishments providing related services. The assets may be tangible, as is the case of real estate and equipment, or intangible, as is the case with patents and trademarks. This sector also includes establishments primarily engaged in managing real estate for others; selling, renting and/or buying real estate for others; and appraising real estate. Another component of this sector includes the renting of motor vehicles, computers, videos, formal wear, furniture, and other consumer goods.

The **Professional, Scientific, & Technical Services** sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. Activities performed include: legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; veterinary services; and other professional, scientific, and technical services.

A new Industrial sector is **Management of Companies & Enterprises**, which includes three main types of establishments: (1) those that hold the securities of (or other equity interests in) companies and enterprises; (2) those entities (except government establishments) that administer, oversee, and manage other establishments of the company or enterprise but do not hold the securities of these establishments; and (3) those that both administer, oversee, and manage other establishments of the company or enterprise and hold the securities of (or other equity interests in) these establishments. Those establishments that administer, oversee, and manage normally undertake the strategic or organizational planning and decision-making role of the company or enterprise. In short, these establishments are primarily the headquarters for various companies. For example, Potlatch, Idaho Power, Washington Group International, and Albertsons are just a few of the companies that have corporate offices in Idaho but their primary activity is in a specific industry. Potlatch is classified in *Wood Products* and *Paper Manufacturing*, Idaho Power is in *Utilities*, Washington Group International is in *Construction*, and Albertsons, Inc. is in *Food & Beverage Stores*.

The *Administrative & Support & Waste Management & Remediation Services* subsector comprises establishments performing routine support activities for the day-to-day operations of other organizations. Industries in the *Administrative & Support Services* specialize in one or more of these support activities and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include: office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, and cleaning. Generally speaking, call centers are classified in this sector. Many of the activities performed in this subsector are ongoing routine support functions that all businesses and organizations must do and have traditionally done for themselves. Recent trends, however, are to contract or purchase such services from businesses that specialize in such activities and can, therefore, provide the services more efficiently. One example of this type of business is payroll processing establishments. *Waste Management & Remediation Services* establishments are in the collection, treatment, and disposal of waste materials. This includes local hauling of waste materials; operating materials recovery facilities; providing remediation services; and providing septic pumping and other miscellaneous waste management services.

The **Educational Services** sector comprises establishments that provide instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments such as schools, colleges, universities, and training centers, as well as private colleges and universities. This sector includes schools teaching in the areas of cosmetology, flight, business, computer, fine arts, sports and recreation, language, driving, etc. These establishments may be privately owned and operated for profit or not for profit, or they may be publicly owned and operated.

The **Health Care & Social Assistance** sector includes both health care and social assistance because it is sometimes difficult to distinguish between the boundaries of these two activities. The industries in this sector are arranged on a continuum starting with those establishments providing medical care exclusively, continuing with industries providing health care and social assistance, and finally finishing with industries providing only social assistance. Day cares, nursing homes, residential care facilities, rehabilitation centers, counseling services, as well as variety of medical services, are included in this sector. The services provided by establishments in this sector are delivered by trained professionals. Industries in the *Hospitals* subsector provide medical, diagnostic, and treatment services that include physician, nursing, and other health services to inpatients and the specialized accommodation services required by

inpatients. Hospitals may also provide outpatient services as a secondary activity.

The **Arts, Entertainment, & Recreation** sector includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons. This sector comprises: (1) establishments that are involved in producing, promoting, or participating in live performances, events, or exhibits intended for public viewing; (2) establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and (3) establishments that operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement, hobby, and leisure time interests.

The **Accommodation & Food Services** sector comprises establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption. Industries in the *Accommodation* subsector provide lodging or short-term accommodations for travelers, vacationers, and others. The subsector is organized into three industry groups: (1) traveler accommodation, (2) recreational accommodation, and (3) rooming and boarding houses. Industries in the *Food Services & Drinking Places* subsector prepare meals, snacks, and beverages to customer order for immediate on-premises and off-premises consumption. The establishments in this groups are classified according to the services provided—full-service restaurants; limited-service eating places; special food services, such as food service contractors, caterers, and mobile food services; and drinking places.

The *Other Services* (except Public Administration) sector comprises establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities, such as equipment and machinery repair, promoting or administering religious activities, grant making, advocacy, and providing dry cleaning and laundry services, personal care services, death care services, pet care services, photo finishing services, temporary parking services, and dating services.

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FYI Table 1: Businesses by NAICS Industry Classification—North Idaho

LOGGING	WHOLESALE TRADE	PROFESSIONAL & BUSINESS SERVICES
St. Maries Logging, Inc.	North Columbia Equipment, LLC	Center Partners, Inc. (call centers)
Fousts, Inc.	Simplot Jacklin Seed Company	Eclipse Traffic Control & Flagging, Inc.
Shawn Montee Timber Corp.	Building Maintenance & Supply	Environmental Reclamation, Inc.
Precision Helicopters	Fleet Parts & Service, Inc.	Hagadone Corporation (corporate headquarters)
Avery Logging Co., Inc.	Emerald Distributors, Inc. (dairy products)	Waste Management of Idaho, Inc.
MINING	RETAIL TRADE	LABOR
Coeur Silver Valley, Inc.	Boundary Trading Co. (food & drug)	Labor Ready Northwest, Inc.
Woods Crushing & Hauling, Inc.	St. Maries Harvest Foods	EDUCATION & HEALTH CARE
Emerald Creek Garnet Co.	Wal-Mart	Coeur d'Alene Christian School
Hecla Mining Co.	Coldwater Creek, Inc. (catalog company)	Rocky Mountain Academy, Inc.
Ruen Core Drilling, Inc.	Dave Smith Motors	Elk Mountain Academy
UTILITIES	TRANSPORTATION & WAREHOUSING	Sandpoint School of Hair Design
Avista Corporation	Jack A. Buell Trucking	American Institute of Clinical Massage, LTD
North Water Sewer District	Lake Coeur d'Alene Cruises, Inc.	Panhandle Driving School
Ross Point Water District	United Parcel Service, Inc.	Life Care Centers of Sandpoint
Dalton Water Association	P & P Courier	Valley Vista Care Center (nursing homes)
CONSTRUCTION	Eastport Industries (rail reload center on U.S.-Canadian border)	Selkirk General surgery
Contractors Northwest, Inc.	INFORMATION	A Full Life Agency, Inc. (home health care)
Norms Utility Contractor, Inc.	Verizon Northwest, Inc.	Angel Aides, Inc. (home health care)
Bonnors Ferry Truss	Coeur d'Alene Press	LEISURE & HOSPITALITY
Interstate Concrete & Asphalt Co.	Century Publishing	Hagadone Hospitality Co
Pugh Brothers Construction	Blue Sky Broadcasting, Inc.	Silverwood Theme Park
WOOD PRODUCTS MANUFACTURING	KHTG/KVRI Radio	Schweitzer Mountain Resort
Stimson Lumber Co., Inc.	Rena Theatre	Beachhouse Bar and Grill
Potlatch Corporation	Pend Oreille Printers, Inc.	McDonald's
Louisiana-Pacific Corp.	FINANCIAL ACTIVITIES	Buds Drive Inn, Inc.
J D Lumber, Inc.	Wells Fargo Bank	Sandpoint West Athletic Club
Lignetics (wood pellets & pres-to logs)	Sandpoint Title Insurance, Inc.	Twin Lakes Village Property Association
Stratford Homes (custom modular homes)	Bank of Latah	OTHER SERVICES
Malloy Lumber Company, Inc.	Horizon Federal Credit Union	Jerry's Body Shop
OTHER MANUFACTURING	Pace-Kerby & Co. (insurance)	Pend Oreille Shores Resort
Flexcel, Inc. (formerly, Harpers; furniture)	Century 21 Beutler & Associates	Mountain States Glass (auto glass repair call center)
Litehouse, Inc. (salad dressings & sauces)	Tomlinson - Black Property Management	Nu-Way Wash-O-Mat & Dry Clean
Spunstrand, Inc. (plastic products)	U-do-it Rental Centers	Coeur d'Alene Chamber of Commerce
Peet Shoe Dryer, Inc. (electric dryers for boots)	Enterprise Rent-a-Car	Girl Scouts Inland Empire Council
B F Redi Mix, Inc. (concrete)	Heartland Realty Investors, Inc.	Yates Funeral Home, Inc.
Advanced Input devices (electronic devices)		Lyle's Hair Design, Inc.
Cygnus, Inc. (precision sheet metal fabrication)		
Transtector (surge suppressors)		

FYI Table 2: North Idaho Labor Force & Employment Annual Averages 1997-2002
(Includes Benewah, Bonner, Boundary, Kootenai, & Shoshone Counties)

	Annual Average 1997	Annual Average 1998	Annual Average 1999	Annual Average 2000	Annual Average 2001	Annual Average 2002
Civilian Labor Force	86,524	88,971	88,603	88,570	88,341	92,214
Unemployed	7,608	7,445	7,821	7,365	7,703	8,074
Percent of Labor Force Unemployed	8.8	8.4	8.8	8.3	8.7	8.8
Total Employment	78,916	81,526	80,782	81,205	80,638	84,141
Nonfarm Payroll Jobs - NAICS	61,665	62,761	64,583	66,763	67,943	68,438
GOODS PRODUCING INDUSTRIES	13,237	13,291	13,427	13,520	13,425	12,846
<i>Natural Resources & Mining</i>	2,102	2,094	2,092	2,067	1,738	1,521
<i>Construction</i>	4,381	4,510	4,677	4,662	4,639	4,478
<i>Manufacturing</i>	6,754	6,687	6,657	6,791	7,048	6,847
Wood Product Manufacturing	2,679	2,543	2,521	2,533	2,863	2,836
Other Manufacturing	4,075	4,144	4,136	4,258	4,185	4,012
SERVICE PRODUCING INDUSTRIES	48,428	49,470	51,156	53,243	54,518	55,592
<i>Trade, Transportation, & Utilities</i>	13,756	13,545	13,614	13,709	13,347	13,283
Wholesale Trade	1,654	1,560	1,487	1,452	1,382	1,345
Retail Trade	9,895	10,359	10,469	10,543	10,285	10,289
Utilities	932	363	351	344	366	368
Transportation & Warehousing	1,276	1,264	1,307	1,369	1,314	1,281
<i>Information</i>	1,026	1,194	1,375	1,442	1,401	1,267
<i>Financial Activities</i>	2,411	2,544	2,683	2,594	2,758	2,815
<i>Professional & Business Services</i>	4,094	4,183	4,670	5,096	6,391	6,725
Educational & Health Services	4,636	4,888	5,060	5,652	5,998	6,624
Leisure & Hospitality	7,900	8,102	8,146	8,940	8,126	8,254
Other Services	2,027	2,050	2,142	2,103	2,282	2,218
Government Education	4,349	4,432	4,549	4,743	4,828	4,890
Government Administration	7,459	7,775	8,006	7,981	8,409	8,532
Government Tribes	770	758	911	985	977	984

FYI Table 3: Businesses by NAICS Industry Classification—North Central Idaho

LOGGING	OTHER MANUFACTURING	FINANCIAL ACTIVITIES
Steve Henderson Logging, Inc.	ATK (formerly Blount)	Blue Cross & Blue Shield of Oregon
R F Coon Logging, Inc.	Pacific Cabinets Inc.	Kamiah Community Credit Union
Carson Helicopter	Clearwater Concrete, Inc.	Bank of Latah
Evergreen Logging Co.	Stone Mountain Archery	F.M. Blake & Associates
Pierson Enterprises, Inc.	Hillco, Inc.	Hill Enterprises, Inc.
MINING	Lewiston Printing	Hertz Rent-A-Car
North Idaho Crushing, Inc.	Bentz Boats, LLC	K & R Video
Seubert Excavators, Inc.	WHOLESALE TRADE	The Management Co.
Wendt Pottery	Bell Equipment, Inc.	PROFESSIONAL & BUSINESS SERVICES
Atlas Sand & Rock, Inc.	Jacksons Buy Sell Trade LTD	Potlatch Corporation (corporate headquarters)
Amador Silver & Gold Mining Co.	Odom Northwest Beverage	Express Temporary Services, Inc.
UTILITIES	St. John Hardware & Implement Co., Inc.	Latah Sanitation
Clearwater Power Co.	Lewiston Grain Growers	Eco Analysts, Inc.
Avista Corporation	Columbia Grain International	Clearwater Valley Veterinarian Clinics
Idaho County Light & Power Co-Op Assn., Inc.	Andrews Equipment Service of Washington, Inc.	Dee Osborne's Janitor Service
Elk City Water & Sewer Assn.	RETAIL TRADE	Olympic Security Services Inc.
Ford Hydro, Inc.	Zip Trip #21	EDUCATION & HEALTH CARE
CONSTRUCTION	Wal-Mart	Palouse Empire Gymnastics Inc.
Debco	Michaels Arts & Crafts	Communities Creating Connection, Inc.
M.L. Albright & Sons, Inc.	Kings	Blue Mountain Academy, Inc.
Kenaston Corporation	Office Depot, Inc.	Moscow School of Massage, Inc.
BCL Electric, Inc.	Rogers Motors, Inc.	Community Action Agency, Inc.
Arnzen Building Construction	TRANSPORTATION & WAREHOUSING	Clearwater Valley Hospital & Clinics
McCann Development Co., LLC	Quad Cities Moving & Storage	Gritman Medical Center
FOOD MANUFACTURING	River Quest Excursions	Grangeville Health and Rehabilitation Center
Twin City Foods, Inc.	Swift Transportation Co.	Tendercare Childrens Center
Wheatberries Bake Shop	Valley Transit	LEISURE & HOSPITALITY
Greenfield Coffee	United Parcel Service, Inc.	Lewis & Clark RV Park
Sonnen Meats, Inc.	Harlows School Bus Service, Inc.	Riverview Marina, Inc.
Lathams Custom Meats	Hillcrest Aircraft Co.	Ponderosa Restaurant & Brass Rail
WOOD PRODUCTS MANUFACTURING	INFORMATION	University Inn-Best Western
Pineda Post and Poles, Inc.	Tribune Publishing Co.	Salmon Rapids Lodge, Inc.
Konkolville Lumber Co., Inc.	Eastside Cinemas	Lolo Trail Cafe
Kamiah Mills	KORT Radio	Bryden Canyon Golf Course
Potlatch Corporation	US West Communications, Inc.	Holiday River Expeditions
Bennett Lumber Products	Clearwater Web Solutions	OTHER SERVICES
PAPER MANUFACTURING	Inland Cellular	Blue Ribbon Linen Supply, Inc.
Potlatch Corporation		Certified Welding & Fabrication
		Appaloosa Horse Club, Inc.
		B.P.O.E. 1825
		Orofino Body Shop, Inc.
		Pine Hills Funeral Chapel, Inc
		Chamber of Commerce
		Melody Muffler & Hitch Center
		Third Dimension Cuts

FYI Table 4: North Central Idaho Labor Force & Employment Annual Averages 1997-2002
(Includes Nez Perce County, Idaho, and Asotin County, Washington)

	Annual Average 1997	Annual Average 1998	Annual Average 1999	Annual Average 2000	Annual Average 2001	Annual Average 2002
Civilian Labor Force	35,279	36,333	35,572	34,488	34,260	34,835
Unemployed	1,271	1,398	1,329	1,483	1,497	1,646
Percent of Labor Force Unemployed	3.6	3.8	3.7	4.3	4.4	4.7
Total Employment	34,008	34,935	34,243	33,004	32,763	33,189
Nonfarm Payroll Jobs - NAICS	26,145	27,044	27,254	28,553	27,716	27,505
GOODS PRODUCING INDUSTRIES	5,059	5,032	4,970	4,955	4,687	4,682
<i>Natural Resources & Mining</i>	336	284	233	230	227	218
<i>Construction</i>	1,327	1,350	1,353	1,369	1,343	1,232
<i>Manufacturing</i>	3,397	3,398	3,384	3,355	3,118	3,232
Wood Product Manufacturing	682	652	658	642	594	584
Food Manufacturing	136	127	117	107	116	107
Paper Manufacturing	1,236	1,308	1,318	1,313	1,225	1,228
Other Manufacturing	1,342	1,310	1,291	1,293	1,183	1,313
SERVICE PRODUCING INDUSTRIES	21,086	22,012	22,284	23,598	23,030	22,822
<i>Trade, Transportation, & Utilities</i>	6,320	6,522	6,533	6,368	6,225	6,050
Wholesale Trade	865	876	853	713	691	655
Retail Trade	4,364	4,459	4,372	4,302	4,163	4,095
Utilities	94	96	94	94	92	88
Transportation & Warehousing	997	1,092	1,214	1,259	1,279	1,212
<i>Information</i>	347	351	370	408	386	366
<i>Financial Activities</i>	1,460	1,482	1,518	1,851	1,805	1,823
<i>Professional & Business Services</i>	1,399	1,487	1,488	1,485	1,555	1,542
Educational & Health Services	3,299	3,473	3,520	3,705	4,010	4,035
Leisure & Hospitality	2,583	2,570	2,623	2,656	2,560	2,666
Other Services	1,189	1,160	1,275	1,950	1,338	1,196
Government Education	2,046	2,184	2,291	2,322	2,357	2,337
Government Administration	1,828	1,998	1,851	2,022	1,957	1,936
Government Tribes	614	785	817	832	836	873

FYI Table 5: Businesses by NAICS Industry Classification—South Central Idaho

NATURAL RESOURCES (LOGGING & MINING)	WHOLESALE TRADE	PROFESSIONAL & BUSINESS SERVICES
Gold Star Stone, Inc.	Magic Valley International	Hepworth, Lezamiz & Hornhorst Chtd.
Glendale Construction, Inc.	Magic Valley Pipe, Inc.	Titlefact, Inc.
UTILITIES	Rocky Mountain Hardware, Inc.	Clear Springs Foods, Inc. (corporate headquarters)
Idaho Power Co.	Automated Dairy Systems	Dell USA, LP
Raft River Rural Electric-Coop, Inc.	Max Herbold, Inc.	Gem State Staffing
United Electric Co-op, Inc.	Jerome Pro Livestock Marketing Assn.	Kyle, Inc.
Intermountain Gas, Inc.	RETAIL TRADE	Marketron, A Division of Buymed
Twin Falls Canal Co.	Con Paulos, Inc.	Ag-Mart Services, Inc.
Big Wood Canal Co.	Napa Auto Parts	Dell Home Systems Co.
CONSTRUCTION	Wilson-Bates Appliance Stores, Inc.	Hailey Nursery, Inc.
Bishop Builders, Inc.	The Home Depot	EDUCATION & HEALTH CARE
Storey Construction, Inc.	Albertsons, Inc.	Community School, Inc
Intermountain Consulting Group	Deb Shops of Idaho, Inc.	Gym-Mania, Inc.
Dennis Kavanagh Construction	Target	Hailey Medical Clinic
Cleary Building Corporation	Wal-Mart	Idacare
Hoffbuhr Excavating Co., Inc.	Sears Roebuck and Co.	St. Benedicts Family Medical Center
Renegade of Idaho	TRANSPORTATION & WAREHOUSING	Lorraines Day Care, Inc.
Gordon Paving Co., Inc.	Twin Falls Airport	Life Care Centers of America
FOOD MANUFACTURING	Sun Valley Airport	Gooding Rehabilitation
Rangen, Inc.	Transsystems, LLC	Idaho Youth Ranch, Inc.
Amalgamated Sugar Co., LLC	Arlo G. Lott Trucking, Inc.	Idaho Migrant Council
J.R. Simplot - Heyburn Plant	Idaho Milk Transportation, Inc.	Meridian Developmental Center, Inc.
Clear Springs Foods, Inc.	Montana Express	LEISURE & HOSPITALITY
McCain Foods, Inc.	Americold Logistics, LLC	Magic Valley Speedway, Inc.
Rite Stuff Goods, Inc	Federal Express	Clear Lake Country Club, Inc.
Seneca Foods Corporation	INFORMATION	Twin Falls Fitness Center
Glanbia Foods, Inc.	Twin Falls Times-News	Outback Steakhouse
Jerome Cheese Co.	Mountain Express	Ameritel Inn-Twin Falls
Independent Meat Co.	Burley Theatre	Pioneer Saloon, Inc.
OTHER MANUFACTURING	Twin Falls LLC - KMVT-TV	Renaissance Arts Center, Inc.
Boise Cascade Corrugated Container Division	FINANCIAL ACTIVITIES	OTHER SERVICES
Longview Fibre Co.	Farmers National Bank	Snyders Paul Automotive, Inc.
Moore Business Forms, Inc.	Eagan Real Estate, Inc.	Smania Furniture Finishing, Inc.
Spears Manufacturing Co., Inc.	Wells Fargo Bank	Great Clips
Solo Cup Company	AHI Sun Valley, Inc.	White Mortuary
Seastrom Manufacturing Co., Inc.	Hertz Rent-A-Car	Ameripride Linen & Apparel Service
Smith Sport Optics, Inc.	Hollywood Video	Animal Shelter of Wood River Valley
	A. G. Edwards & Sons, Inc.	Snake River Area Council, Inc.
	D. L. Evans Bank	Sun Valley - Ketchum Chamber of Commerce
	Amerititle, Inc.	Region IV Development Assn., Inc.
	Land Title & Escrow, Inc.	Sun Valley Elkhorn Assn.
	McDonald Insurserve	

FYI Table 6: South Central Idaho Labor Force & Employment Annual Averages 1997-2002
(Includes Gooding, Jerome, & Twin Falls Counties)

	Annual Average 1997	Annual Average 1998	Annual Average 1999	Annual Average 2000	Annual Average 2001	Annual Average 2002
Civilian Labor Force	49,422	48,396	47,707	47,353	48,854	50,236
Unemployed	2,253	2,205	2,201	2,063	1,954	2,119
Percent of Labor Force Unemployed	4.6	4.6	4.6	4.4	4.0	4.2
Total Employment	47,169	46,191	45,506	45,290	46,900	48,117
Nonfarm Payroll Jobs - NAICS	35,009	35,997	37,047	37,801	38,582	39,310
GOODS PRODUCING INDUSTRIES	6,559	6,447	6,790	7,053	6,815	7,277
<i>Natural Resources & Mining</i>	53	44	31	37	44	34
<i>Construction</i>	1,891	1,835	1,949	1,926	1,838	1,982
<i>Manufacturing</i>	4,615	4,567	4,810	5,091	4,933	5,260
Food Manufacturing	2,846	2,897	3,055	3,246	3,126	3,387
Other Manufacturing	1,769	1,670	1,755	1,844	1,807	1,874
SERVICE PRODUCING INDUSTRIES	28,450	29,550	30,258	30,748	31,767	32,034
<i>Trade, Transportation, & Utilities</i>	9,650	9,916	9,980	10,047	9,959	9,740
Wholesale Trade	1,843	1,939	1,852	1,795	1,830	1,813
Retail Trade	5,868	5,914	5,996	6,026	5,828	5,750
Utilities	202	202	202	211	199	205
Transportation & Warehousing	1,737	1,861	1,931	2,015	2,102	1,972
<i>Information</i>	525	541	553	532	484	493
<i>Financial Activities</i>	1,415	1,454	1,554	1,450	1,557	1,635
<i>Professional & Business Services</i>	2,485	2,930	3,188	3,496	4,251	4,679
Educational & Health Services	3,075	3,160	3,253	3,327	3,301	3,033
Leisure & Hospitality	3,245	3,337	3,288	3,363	3,401	3,483
Other Services	1,298	1,277	1,277	1,209	1,329	1,424
Government Education	3,170	3,277	3,477	3,522	3,602	3,496
Government Administration	3,588	3,659	3,687	3,802	3,883	4,051

FYI Table 7: Businesses by NAICS Industry Classification—Southeast Idaho

NATURAL RESOURCES (LOGGING & MINING)	OTHER MANUFACTURING (cont.)	PROFESSIONAL & BUSINESS SERVICES
Washington Group International, Inc.	Freedom Plastics, Inc., Idaho	Convergys Customer Management
J.R. Simplot - Smoky Mine	Monsanto Co.	Anderson Personnel Services
Dravo-Soda Springs	Shepherd Truss Co., Inc.	Idaho Power Co. (area headquarters)
Hess Pumice Products, Inc.	WHOLESALE TRADE	Waste Connections, Inc.
Treasure Canyon Calcium Co.	Plastic Industries, Inc.	A & E Engineering, Inc.
Kerr-McGee Chemical, LLC	Bingham Cooperative, Inc.	Hawthorne Animal Hospital, PA
J K Merrill & Sons, Inc.	Valley Implement Motor Co., Inc.	Blue Ribbon Cleaning Contractors
UTILITIES	Intermountain Beverage Co., Inc.	Butler Engineering & Land Surveying, PA
Intermountain Gas, Inc.	Walton Feed, Inc.	EDUCATION & HEALTH CARE
Pacificorp	Idaho Asphalt Supply, Inc.	Malad Valley Clinic
Aberdeen Springfield Canal Co.	RETAIL TRADE	Portneuf Medical Center
Last Chance Canal Co.	Wal-Mart	Bear Lake Dental Care, PLLC
CONSTRUCTION	Lew & Dan's Thriftway	Bear River Head Start
SME Steel Contractors	Soda Springs Chevron	Blackfoot Charter Community Learning Center
Premier Technology, Inc.	West Motor Co., Inc.	Ironworkers Apprentice Training
Mark III, Inc.	Fountain Hills Nursery	Pocatello Beauty Academy, Inc.
S & J Electric, Inc.	Officemax, Inc.	Kasai Dance Studio
R E Beck Construction, Inc.	McKee Feed & Seed	Hillcrest Haven Convalescent
Mullen Crane & Transport, Inc.	TRANSPORTATION & WAREHOUSING	Highland Hills Alternate Care
Modern Roofing & Insulation, Inc.	Scenic Canyons Recreational Services, Inc.	Pocatello Womens Health Clinic
FOOD MANUFACTURING	Union Pacific Railroad	Golden Age Heritage Home
Basic American Foods, Inc.	Sky West Airlines	Little Tykes Preschool
Lamb-Weston, Inc.	Moss Trucking, Inc.	LEISURE & HOSPITALITY
Great Western Malting Co.	Salmon River Stages	Preston Golf & County Club, Inc.
The Blackfoot Cheese Co.	Miles Bus Co., Inc.	Red Lyon Hotel
Great Harvest Bread Co.	Driscoll Potatoes, Inc.	Applebees
Hibbard Packing	United Parcel Service, Inc.	McDonald's Restaurants
FABRICATED METAL PRODUCT MANUFACTURING	INFORMATION	Fitness Inc. Health Club
AMS, Inc.	Cable One, Inc.	Blackfoot Swimming Pool
Machine Dynamics	US West Communications, Inc.	Riverdale Resort
Scott's Service	Idaho State Journal	OTHER SERVICES
Toms Metal Enterprises, LLC	KPVI Television	American Linen
Triple K Equipment, Inc.	Idaho Wireless Corporation	Lundahl Ironworks, Inc.
Roxon Performance Coatings, Inc.	Idanha Theatre Co.	Anderson Body & Glass
MACHINERY MANUFACTURING	Direct Communications Rockland	Bailey Creek Community Assn.
Spudnik Equipment Co., LLC	KWIK/KPKY/KLLP-FM	Amenities Association, Inc.
Double I, Inc.	FINANCIAL ACTIVITIES	La Bella Vita Salon & Spa
Kim-Ran Screw Products, Inc.	Naylor Insurance, Inc.	Boy Scouts of America Grand Teton Council
Idaho Hydraulics, Inc.	Ireland Bank	Colonial Funeral Home
OTHER MANUFACTURING	Great American Video	Foothill Dry Cleaners, Inc.
American Microsystems, Inc.	First American Title Co.	
J.R. Simplot - Don Plant	Housing Authority of Pocatello	
Tesh Manufacturing, Inc.	All Coverage Insurance Agency	
Citizen Press, Inc.	A G Edwards & Sons, Inc.	
	Westwood Mall Associates	

FYI Table 8: Southeast Idaho Labor Force & Employment Annual Averages 1997-2002
(Includes Bannock County)

	Annual Average 1997	Annual Average 1998	Annual Average 1999	Annual Average 2000	Annual Average 2001	Annual Average 2002
Civilian Labor Force	38,744	39,520	39,192	39,502	39,780	39,383
Unemployed	2,137	1,937	2,069	1,969	1,894	2,501
Percent of Labor Force Unemployed	5.5	4.9	5.3	5.0	4.8	6.4
Total Employment	36,607	37,583	37,123	37,533	37,886	36,882
Nonfarm Payroll Jobs - NAICS	30,557	30,978	31,998	32,637	33,118	32,704
GOODS PRODUCING INDUSTRIES	4,537	4,545	4,663	4,409	4,449	4,209
<i>Natural Resources & Mining</i>	8	9	11	14	15	14
<i>Construction</i>	1,822	1,792	1,852	1,612	1,739	1,610
<i>Manufacturing</i>	2,707	2,745	2,800	2,783	2,695	2,585
Food Manufacturing	700	602	574	492	422	460
Fabricated Metal Product Manufacturing	211	150	157	147	145	122
Machinery Manufacturing	53	33	40	42	32	31
Other Manufacturing	1,742	1,960	2,029	2,101	2,097	1,972
SERVICE PRODUCING INDUSTRIES	26,019	26,433	27,335	28,229	28,669	28,495
<i>Trade, Transportation, & Utilities</i>	7,353	7,015	7,128	6,915	6,774	6,670
Wholesale Trade	1,168	1,122	1,101	1,118	1,110	1,045
Retail Trade	4,218	4,463	4,599	4,563	4,423	4,366
Utilities	77	78	79	81	43	48
Transportation & Warehousing	1,890	1,352	1,350	1,153	1,199	1,211
<i>Information</i>	396	522	553	636	627	675
<i>Financial Activities</i>	1,551	1,536	1,617	1,787	1,854	1,802
<i>Professional & Business Services</i>	1,820	1,988	2,472	3,214	3,271	3,272
Educational & Health Services	2,440	2,547	2,632	2,748	2,961	2,951
Leisure & Hospitality	3,238	3,422	3,422	3,393	3,354	3,199
Other Services	1,135	1,132	1,197	1,024	1,202	1,201
Government Education	4,737	4,866	4,790	4,971	5,045	4,963
Government Administration	3,349	3,404	3,525	3,541	3,580	3,761

FYI Table 9: Businesses by NAICS Industry Classification—Northeast Idaho

NATURAL RESOURCES (LOGGING & MINING)	OTHER MANUFACTURING	INFORMATION
Thompson Creek Mining Co.	Bergmeyer Manufacturing Co., Inc.	Paramount Twin, Inc.
Eagle Rock Timber, Inc.	High Range Designs, LLC	Mud Lake Telephone Cooperative Assn.
Meridian Gold Co.	Artco	Salmon Library Assn., Inc.
Kaufman Timber	Intermountain Technologies, Inc.	Post Register
UTILITIES	Challenger Pallet & Supply, Inc.	KIFI-TV
Fall River rural Electric Cooperative, Inc.	Crooked Creed Ranch, Inc.	Cable One, Inc.
Intermountain Gas, Inc.	High Valley Concrete, LLC	Edge Wireless
Pacificorp	Yellowstone Plastics, Inc.	Base Data Services, Inc.
Northwest Power Services, Inc.	Hyde Water Conditioning	FINANCIAL ACTIVITIES
Stanley Sewer Assn., Inc.	Melaleuca, Inc.	Piper Jaffray, Inc.
CONSTRUCTION	WHOLESALE TRADE	TNT Housemovers
H & K Contractors, Inc.	Melaleuca, Inc.	Hollywood Video
Wheeler Electric, Inc.	Norsun Food Group, Inc.	Aspen Village Management, LLC
Yellowstone Log Homes, LLC	Rigby Produce, Inc.	Idaho Title & Trust
KB Construction & Supply	Corporate Express of the West	Beehive Federal Credit Union
Edstrom Construction, Inc.	L & W Stone Corporation	Avis Rent-A-Car
The Layton Companies, Inc.	Chesbro Music Co.	The Bank of Commerce
Carson Concrete, Inc.	Idaho Livestock Auction, LLC	Re/Max Homestead Realty
Ledcor Industries USA, Inc.	Ikon Office Solutions, Inc.	PROFESSIONAL & BUSINESS SERVICES
FOOD MANUFACTURING	RETAIL TRADE	BNFL, Inc.
Idaho Fresh-Pak, Inc.	Wal-Mart	Center Partners, Inc.
King-B, Inc.	The Home Depot	Blaine Larsen Farms, Inc. (corporate headquarters)
Blaine Larsen Farms, Inc.	Broulim's Foodtown	Bechtel BWTX Idaho, LLC
Idaho Pacific Corporation	Trail Creek Nursery, Inc.	Empro Professional Employer
Great Harvest Bread Co.	Maverik Country Stores, Inc.	Idaho Cleaning and Maintenance
Nelson-Ricks Creamery Co.	Porter's Book & Variety, Inc.	MD Landscaping, Inc.
FABRICATED METAL PRODUCT MANUFACTURING	Salmon River Motors, Inc.	Intermountain Tax, Inc.
American Fabrication, Inc.	Webster Potato Co.	Driggs Veterinary Clinic, PS
Summit Steel	Merlins Service Center	EDUCATION & HEALTH CARE
Bears Fabrication	McCoys Tackle Shop-Gift Shop	Salmon River Industries Development, Inc.
Lost River Ballistic Technologies, Inc	TRANSPORTATION & WAREHOUSING	Personal Home Care, Inc.
Old West Blacksmith, Inc.	Doug Andrus Coal & Grain Co.	Ashton Memorial Nursing Home
MACHINERY MANUFACTURING	United Parcel Service, Inc.	Eastern Idaho Regional Medical Center
Idaho Steel Products, Inc.	Golden Valley Transportation, Inc.	Brigham Young University Idaho
Miskin Scraper Works, Inc.	Golden Valley Transportation, Inc.	Lutheran Good Samaritan Society
Valley Sheet Metal	Teton Aviation Center	Idaho Falls Dental Group, Inc.
Matrix Drilling Products Co.Inc.	Salmon Air Taxi	El Castillito (Headstart)
Davis Machine, LLC	Loosli Elevators	Little Peoples Academy
Linderman Manufacturing Co., Inc.		Upper Valley Resource & Counseling, LLC

Continued on next page

FYI Table 9: Businesses by NAICS Industry Classification—Northeast Idaho (cont.)

LEISURE & HOSPITALITY	LEISURE & HOSPITALITY (cont.)	OTHER SERVICES (cont.)
Bowl Ero Lanes	Applebees	Eastern Idaho Special Services Agency
Echo River Trips	Wendys	D & L Dry Cleaning
Pierres Playhouse, Inc.	Idaho Falls Padres Baseball Club, Inc.	Henrys Fork Foundation, Inc.
Heise Hot Springs, Inc.	OTHER SERVICES	Reflections Hair & Nail Design
Redfish Lake Lodge	Gary's Autobody, Inc.	Bonneville Humane Society
Apple Fitness Idaho Falls	Heirloom Reflections, LLC	
Westcoast Idaho Falls Hotel	Erickson Glass Satellite-Radio	

FYI Table 10: Northeast Idaho Labor Force & Employment Annual Averages 1997-2002
(Includes Bingham, Butte, Bonneville, and Jefferson Counties)

	Annual Average 1997	Annual Average 1998	Annual Average 1999	Annual Average 2000	Annual Average 2001	Annual Average 2002
Civilian Labor Force	77,636	79,998	80,076	80,252	80,002	83,069
Unemployed	3,331	3,222	3,314	3,025	3,013	3,235
Percent of Labor Force Unemployed	4.3	4.0	4.1	3.8	3.8	3.9
Total Employment	74,305	76,776	76,762	77,227	76,989	79,834
Nonfarm Payroll Jobs - NAICS	57,121	58,010	60,083	61,542	62,433	62,314
GOODS PRODUCING INDUSTRIES	8,050	8,182	8,537	8,714	9,154	9,233
<i>Natural Resources & Mining</i>	60	56	50	61	72	73
<i>Construction</i>	3,603	3,690	3,906	4,034	4,220	4,411
<i>Manufacturing</i>	4,386	4,436	4,581	4,619	4,862	4,749
Food Manufacturing	2,945	2,849	2,895	2,822	2,895	2,763
Fabricated Metal Product Manufacturing	242	244	230	237	283	260
Machinery Manufacturing	411	432	431	469	357	425
Other Manufacturing	1,200	1,343	1,456	1,560	1,685	1,726
SERVICE PRODUCING INDUSTRIES	49,071	49,828	51,546	52,827	53,279	53,081
<i>Trade, Transportation, & Utilities</i>	14,344	14,488	14,833	14,908	14,538	14,495
Wholesale Trade	5,182	5,123	5,211	5,182	4,990	4,990
Retail Trade	7,843	7,944	8,127	8,111	7,850	7,774
Utilities	108	107	106	110	109	101
Transportation & Warehousing	1,211	1,315	1,390	1,505	1,588	1,630
<i>Information</i>	776	787	949	1,031	1,016	921
<i>Financial Activities</i>	1,957	2,077	2,134	2,014	2,063	2,093
<i>Professional & Business Services</i>	10,622	10,555	10,877	11,497	12,101	11,618
Educational & Health Services	4,958	5,141	5,404	5,541	5,753	5,980
Leisure & Hospitality	4,593	4,658	4,874	5,031	4,775	4,860
Other Services	1,850	1,986	2,099	2,326	2,289	2,286
Government Education	4,707	4,748	4,881	4,931	4,946	4,901
Government Administration	5,265	5,388	5,495	5,549	5,799	5,926

FYI Table 11: Businesses by NAICS Industry Classification—Southwest Idaho

NATURAL RESOURCES (LOGGING & MINING)	WOOD PRODUCTS MANUFACTURING (con't.)	TRANSPORTATION EQUIPMENT MANUFACTURING
J.I.Morgan, Inc.	Honco Enterprises, Inc.	Boise Locomotive Co.
G Ikola, Inc.	Woodgrain Millwork, Inc.	Western Trailer Co.
Turner Sand & Gravel, Inc.	Champion Home Builders, Inc.	Preco Electronics, Inc.
Ward Brothers, Inc.	PRINTING & RELATED SUPPORT ACTIVITIES	Skystar Aircraft Corporation
Unimin Corp.	Epoxy Systems, Inc.	Aerocolor
Nelson-Deppe Inc.	Commercial Newspaper Service	Kit Manufacturing Co., Inc.
Geogem usa	A.C. Graphics	Western World, Inc.
UTILITIES	Joslyn & Morris, Inc	Recreational Technologies, Inc.
Sithe Energies Power Services	Cambridge Litho, Inc.	OTHER DURABLE MANUFACTURING
Idaho Power Co.	Printshop McCall	Memorial Monuments & Vaults
Intermountain Gas, Inc.	Lyndale Marketing, Inc.	Image National
United Water of Idaho	First Class, Inc.	Idaho Electric Signs, Inc.
Tamarack Energy Partnership	The Caxton Printers LTD	Ida-Wa Dental Lab, Inc.
Farmers Cooperative Ditch Co., LTD	Owyhee Publishing Co., Inc.	Home-Style Industries, Inc.
Mountain Home Irrigation District	FABRICATED METAL PRODUCT MANUFACTURING	Mountain Home Redi-Mix, Inc.
CONSTRUCTION	Northwest Machining & Manufacturing, Inc.	Sonbyrd Industries, Inc.
S & S Drywall, Inc.	Hobson Fabricating Corporation	SOS, Inc.
Washington Group International, Inc.	Aluma-Glass Industries, Inc.	Weiser Products, Inc.
Interior Systems, Inc.	Steelhead Metal Corporation	McCall Woodworks, Inc.
Challenger Electric, Inc.	Selkirk, LLC	OTHER NONDURABLE MANUFACTURING
Idaho Sand & Gravel Co.	Teton Machine Company	Boise Manufacturing & Truck Tarp, Inc.
Hiddleston Drilling & Pump Co.	Cambridge Welding & Bending	The Bagmaker
Turnkey, Inc.	Barrs Specialty Tools	Fiberglass Sytems, Inc.
Vance Dairy Construction	MACHINERY MANUFACTURING	Boise Cascade Corrugated Container Division
McCrea Heating & Plumbing, Inc.	Nelson Metal Technology, Inc.	Carmela Winery & Vineyards
FOOD MANUFACTURING	Omnipure Filter Co., Inc.	Swire Coca Cola Payette
Fresca Mexican Foods, Inc.	Diamond Z Trailer, Inc.	Mountain Monkey Business, Inc.
Powerfood Manufacturing, Inc.	Nextscan, Inc.	Polyvin, Inc.
Amalgamated Sugar Co., LLC	SCP Global Technologies, Inc.	Jumper Cables Embroidery
Idaho Fresh-Pak, Inc.	Multiquip, Inc.	WHOLESALE TRADE - DURABLES
Dickinson Frozen Foods, Inc.	Yanke Machine Shop, Inc.	Farm Commercial Irrigation, Inc.
Owyhee Meat Co., Inc.	Micro 100 Tool Corporation	Western Recycling
Sourdough, LLC	COMPUTER & ELECTRONIC PRODUCT MANUFACTURING	MWI Veterinary Supply Co.
Appleton Produce Company	Esam, Inc.	Spectek, LLC
R. C. Bigelow, Inc.	Heath Electronic Manufacturing	MWI Veterinary Supply Co.
J.R. Simplot, Co.	MPC LLC (formerly Micronpc)	Dealers Auto Auction of Idaho
WOOD PRODUCTS MANUFACTURING	Plexus Corporation (formerly MCMS)	Pacific Steel & Hardware
Stor-Mor Systems, Inc.	Western Electronics, LLC	55 Brake Co.
Idaho Truss & Component Co.	Micron Technology, Inc.	Western Timber Products, Inc.
Nelson Custom Milling, Inc.	Hewlett Packard Co.	Norco
Evergreen Forests	Extended Systems, Inc.	Idaho Barber & Beauty Supply, Inc.
Hoff Companies, Inc.	Computrol, Inc.	
Fleetwood Homes of Idaho, Inc.		

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FYI Table 11: Businesses by NAICS Industry Classification—Southwest Idaho (cont.)

WHOLESALE TRADE - NONDURABLES	OTHER RETAIL TRADE (cont.)	FINANCE & INSURANCE
Haun Packing Co.	Walgreens	Weiser Valley Title, Inc.
Amerigas Propane, Inc.	Bend Country Store, Inc.	The Insurance Group, Inc.
Dairyland Seed Co., Inc.	Texaco Foodmart	US Bank
Emmett Valley Livestock Auction, LLC	Gap, Inc.	Home Federal Savings & Loan Assn.
Crookham Co.	RC Willey Home Furnishings	Pioneer Federal Credit Union
Agri Beef Co.	The Big Smoke, LLC	Northwest Farm Credit Services
SYSCO/General Food Services	Cloverdale Nursery & Turf Farm	The Money Express Financial
Picture Galleries, Inc.	TRANSPORTATION & WAREHOUSING	Blue Cross of Idaho Health Service
Stein Distributing Co., Inc.	McCall Aviation, Inc.	Pacific Republic Mortgage Corporation
Associated Food Stores, Inc.	May Trucking Co.	REAL ESTATE & RENTAL & LEASING
FOOD & BEVERAGE STORES	Diamond Line Delivery System, Inc.	Tomlinson & Associates, Inc.
Idaho Candy Co.	United Parcel Service, Inc.	DLC Management Corporation
Treasure Valley Beverage, Inc.	John McCray Sanitation Service	A to Z Storage Units, LTD Co.
Boise Consumer Co-op	Brown Bus Co., Inc.	Evergreen Mobile Home Park, LLC
12th Avenue Farm Market, Inc.	Twin Pines Water, Inc.	Holland Realty, Inc.
Jan's Chocolates & Collectibles	United Airlines	Tracy Management, Inc.
Winco Foods	Fleetstreet Couriers	Summit Real Estate Services
Hometown Pizza	Boise Cold Storage Co.	Northwest Appraisal Company
Bruneau Sweetwater, Inc.	INFORMATION - TELECOMMUNICATIONS	U Haul
Paul's Market	Midvale Telephone Exchange, Inc.	Avis Rent-a-Car
GENERAL MERCHANDISE STORES	Starwest Satellite	The Video Place
Shopko Stores, Inc.	Mountain State Cellular, Inc.	McCall Rental & Sales, Inc.
Sears Roebuck & Co.	Cable One, Inc.	PROFESSIONAL & TECHNICAL SERVICES
Wal-Mart	INFORMATION	Weiser Council Veterinary Clinic, Inc.
Crazys Eds Dollar Store	KWEI -Radio	Bergey Land Surveying
Kings	Evergreen Theater	Leavitt & Associates Engineers
OTHER RETAIL TRADE	Lizard Butte Library	Ratliff Law Offices Chartered
Hometown Ford	Pacific Press Publishing	Clearwater Research, Inc.
Mikes Golf Shop	Thrifty Nickel Want Ads	Deloitte & Touche, LLP
IRVCO Asphalt & Gravel, Inc.	Solution Pro, Inc.	AC Bookkeeping, Inc.
Marsing Hardware, Inc.	KTVB-TV	Lombard-Conrad Architects, PA
Emmett Chevron	North by Northwest Productions	MANAGEMENT OF COMPANIES & ENTERPRISES
Unique Boutique	Idaho Statesman	Albertsons Inc. (corporate headquarters)
Lanes Appliance & TV		Idaho Power Co. (corporate headquarters)
Franklin Building Supply Co.		Z- Inc (corporate headquarters)
		Robertson Supply, Inc. (headquarters)
		J.R. Simplot Co. (corporate headquarters)

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FYI Table 11: Businesses by NAICS Industry Classification—Southwest Idaho (cont.)

ADMINISTRATIVE & SUPPORT SERVICES	EDUCATION SERVICES (cont.)	ACCOMMODATIONS
American Staffing, Inc.	New Images Academy of Beauty	Waters Edge RV Resort
Thomas Management Corporation	Idaho Dance Theatre, Inc.	Flying Resort Ranches, Inc.
Community Corrections of Idaho, Inc.	McCall Mountain Canyon Flying Seminars	Ustick Inn Residence Hotel
Travel Nurse Data Bank	Idaho Virtual High School, Inc.	Ameritel Inns, Inc.
Professional Employee Services	Nampa Charter School, Inc.	FOOD SERVICES & DRINKING PLACES
Record Search & Information Services, Inc.	HEALTH CARE - HOSPITALS	Lardo Grill & Saloon, Inc.
Worldcom Technologies, Inc.	Idaho Elks Rehabilitation Hospital	Frosty Palace Drive-In Restaurant, LLC
Telanswer, Inc.	Primary Health, Inc.	Pizza Hut
Mail Boxes & More, LLC	St Alphonsus Regional Medical Center	Chuck-A-Rama Buffet, Inc.
Kinkos, Inc.	Eagle Eye Surgery & Laser Center	Moxie Java
Collection Bureau, Inc.	HEALTH CARE & SOCIAL ASSISTANCE excl. HOSPITALS	Fine Host Corporation (food service)
Capital One Services, Inc.	Weiser Care Center #223	BS Concessions, Inc.
Credit Data of Idaho, Inc.	Valley Family Health Care	Snowbirds & Pour House
Heartland Travel, Inc.	Apple Valley Residential Care	Bittercreek Alehouse
Allied Security, Inc.	Hammett Migrant Head Start	OTHER SERVICES
The Lock Shop, Inc.	Diamond Developmental Center	Thomason Funeral Home, Inc.
Merry Maids	The Boys & Girls Club of Nampa	McCall Area Timeshare Assn.
Sawyers Pest Control of Idaho	Tater Tots Daycare Center	Western Idaho Community Action Program
Dave's Lawn & Garden	Young Mens Christian Assn., Inc.	Perfection Repair, Inc.
Idaho Disaster Kleenup, Inc.	Capitol Dental, PC	Bauers Auto Glass
R.G.I.S. Inventory Specialists	ARTS, ENTERTAINMENT, & RECREATION	Diamond Laundry, Inc.
WASTE MANAGEMENT & REMEDIATION SERVICES	Brundage Mountain Co.	Like Nu Carwashes, Inc.
Lakeshore Disposal, Inc.	Owyhee Lanes & Restaurant	Valley Hair
BFI Waste Systems of NA, Inc.	Idaho Whitewater Unlimited, Inc.	Meadowcreek Property Owners
Asbestos Abatement, Inc.	Roaring Springs Water Park	
EDUCATION SERVICES	Idaho Shakespeare Festival, Inc.	
Northwest Nazarene University	Weiser Golf Assn., Inc.	
Childrens House Montessori School	Golds Gym	
Heartland Gymnastics		

FYI Table 12: Southwest Idaho Labor Force & Employment Annual Averages 1997-2002
(Includes Ada and Canyon Counties)

	Annual Average 1997	Annual Average 1998	Annual Average 1999	Annual Average 2000	Annual Average 2001	Annual Average 2002
Civilian Labor Force	213,442	226,793	229,343	236,278	259,308	250,718
Unemployed	8,210	8,275	8,466	8,015	9,869	13,278
Percent of Labor Force Unemployed	3.8	3.6	3.7	3.4	3.8	5.3
Total Employment	205,232	218,518	220,877	228,264	249,440	237,440
Nonfarm Payroll Jobs - NAICS	191,996	201,873	210,611	224,540	229,968	227,364
GOODS-PRODUCING INDUSTRIES	46,966	48,479	49,218	51,023	50,553	47,152
Natural Resources & Construction	13,937	14,116	15,473	16,456	16,675	15,670
Manufacturing	33,029	34,362	33,745	34,567	33,878	31,483
Durable Goods	25,398	26,930	26,459	27,357	26,688	24,548
Wood Product Manufacturing	2,767	2,797	2,859	2,494	1,945	1,874
Fabricated Metal Products Manufacturing	1,598	1,551	1,627	1,665	1,585	1,451
Machinery Manufacturing	1,384	1,490	1,422	1,646	1,623	1,400
Computer & Electronic Product Man	15,874	17,123	16,483	17,408	17,755	16,035
Transportation Equipment Manufacturing	1,841	1,967	1,935	1,964	1,676	1,624
Other Durable Goods	1,935	2,001	2,132	2,180	2,104	2,164
Nondurable Goods	7,631	7,433	7,287	7,209	7,190	6,935
Food Manufacturing	5,761	5,532	5,364	5,292	5,355	5,218
Printing and Related Support Activities	914	896	870	831	791	767
Other Nondurable Goods	957	1,004	1,053	1,087	1,043	950
SERVICE-PRODUCING INDUSTRIES	145,030	153,394	161,393	173,517	179,415	180,212
Trade, Transportation, & Utilities	37,252	38,392	40,618	43,543	44,965	44,380
Trade	30,917	31,863	33,868	36,825	37,749	37,470
Wholesale Trade	9,013	9,089	9,749	10,528	10,375	10,174
Wholesalers, Durable Goods	4,682	4,920	5,653	6,289	6,412	6,315
Wholesalers, Nondurable Goods	3,600	3,471	3,442	3,528	3,167	3,034
Retail Trade	21,903	22,774	24,119	2,408	27,375	27,296
Food and Beverage Stores	4,043	4,137	4,282	4,515	4,417	4,200
General Merchandise Stores	3,611	3,821	3,935	4,740	5,657	5,860
All Other Retail Trade	14,249	14,817	15,902	17,043	17,301	17,236
Transportation, Warehousing, & Utilities	6,335	6,529	6,750	6,718	7,216	6,910
Utilities	466	461	464	462	542	676
Transportation & Warehousing	5,869	6,068	6,286	6,255	6,674	6,234
Information	3,061	3,330	3,709	4,263	3,934	3,656
Telecommunications	919	1,006	1,145	1,608	1,314	1,311
Financial Activities	10,879	11,605	12,124	12,076	11,873	11,980
Finance & Insurance	7,919	8,362	8,845	8,891	8,688	8,893
Real Estate & Rental & Leasing	2,960	3,243	3,279	3,185	3,185	3,087
Professional & Business Services	23,587	25,211	27,512	30,860	31,661	31,543
Professional, Scientific, & Technical	6,394	7,118	8,041	9,259	10,015	10,066
Management of Companies & Enterprises	6,059	6,155	6,787	7,212	7,040	6,787
Administrative & Support & Waste Management	11,134	11,938	12,685	14,389	14,606	14,690
Educational and Health Services	18,969	20,284	20,767	23,457	25,570	26,779
Educational Services	700	824	882	1,937	2,084	2,107
Health Care & Social Assistance	18,269	19,460	19,885	21,520	23,486	24,671
Hospitals	6,471	6,851	7,001	7,419	8,302	8,943
Leisure and Hospitality	16,185	17,222	17,748	19,094	19,807	19,590
Arts, Entertainment, & Recreation	1,827	1,940	1,996	2,133	2,323	2,395
Accommodation & Food Services	14,359	15,282	15,751	16,961	17,484	17,195
Accommodation	1,831	1,935	2,031	2,147	2,118	2,021
Food Services & Drinking Places	12,528	13,348	13,721	14,814	15,367	15,174
Other Services	5,724	6,199	6,560	6,763	6,817	6,692
Total Government	29,373	31,150	32,355	33,461	34,789	35,591
Federal Government	4,771	4,845	4,901	5,179	5,169	5,248
State & Local Government	24,602	26,305	27,454	28,282	29,620	30,344
State Government	10,693	11,675	12,042	12,369	12,986	13,090
State Government Education	3,553	3,824	3,868	3,863	4,093	3,982
State Government Administration	7,140	7,851	8,174	8,506	8,894	9,108
Local Government	13,909	14,630	15,412	15,913	16,634	17,254
Local Government Education	8,123	8,594	9,077	9,437	9,921	10,193
Local Government Administration	5,786	6,036	6,335	6,476	6,712	7,060

FYI Table 13: State of Idaho Labor Force & Employment Annual Averages 1997-2002

	Annual Average 1997	Annual Average 1998	Annual Average 1999	Annual Average 2000	Annual Average 2001	Annual Average 2002
Civilian Labor Force	632,934	653,056	651,090	657,712	681,558	684,749
Unemployed	33,805	32,839	33,697	31,914	33,274	39,683
Percent of Labor Force Unemployed	5.3	5.0	5.2	4.9	4.9	5.8
Total Employment	599,129	620,217	617,393	625,798	648,283	645,066
Nonfarm Payroll Jobs - NAICS	507,478	520,506	538,148	558,588	568,033	567,263
GOODS PRODUCING INDUSTRIES	105,486	106,963	108,744	111,855	110,226	104,920
Natural Resources	5,695	5,329	4,918	4,653	4,061	3,776
Logging	2,703	2,512	2,438	2,307	2,092	2,002
Mining	2,993	2,817	2,480	2,346	1,968	1,774
Metal Ore Mining	1,686	1,571	1,305	1,117	739	533
Construction	32,309	32,622	35,044	36,493	37,851	36,384
Manufacturing	67,481	69,012	68,782	70,709	68,315	64,759
Durable Goods	41,518	43,377	43,267	45,080	43,020	40,294
Wood Product Manufacturing	9,201	8,946	9,046	9,238	7,769	7,561
Sawmills & Wood Preservation	3,142	3,032	2,941	3,050	3,215	3,047
Veneer & Engineered Wood Products	1,877	1,833	1,908	1,790	1,349	1,246
Other Wood Product Manufacturing	4,183	4,081	4,197	3,637	3,205	3,156
Fabricated Metal Product Manufacturing	3,794	3,827	3,943	4,031	3,875	3,647
Machinery Manufacturing	3,065	3,178	3,039	3,304	3,055	2,863
Computer & Electronic Product Man	17,725	19,054	18,407	19,456	19,659	17,829
Transportation Equipment Manufacturing	2,233	2,393	2,455	2,479	2,165	2,126
Other Durable Goods	5,501	5,979	6,376	6,572	6,498	6,268
Nondurable Goods	25,963	25,635	25,515	25,629	25,294	24,466
Food Manufacturing	17,260	16,831	16,705	16,664	16,523	16,307
Fruit & Vegetable Preserving & Specialty Food	9,500	9,080	9,177	9,055	8,872	8,502
Paper Manufacturing	1,669	1,733	1,734	1,746	1,694	1,694
Printing and Related Support Activities	2,328	2,308	2,235	2,339	2,224	2,031
Chemical Manufacturing	2,269	2,359	2,313	2,337	2,325	1,909
Other Nondurable Goods	2,438	2,403	2,527	2,543	2,528	2,524
SERVICE-PRODUCING INDUSTRIES	401,992	413,543	429,404	446,733	457,807	462,343
Trade, Transportation, and Utilities	109,317	111,956	115,744	119,595	117,214	115,832
Trade	91,693	93,795	96,740	100,189	98,062	97,249
Wholesale Trade	24,509	24,614	25,308	25,714	25,465	24,910
Wholesalers, Durable Goods	10,277	10,535	11,085	11,696	11,799	11,593
Wholesalers, Nondurable Goods	12,485	12,381	12,575	12,296	11,728	11,455

FYI Table 13: State of Idaho Labor Force & Employment Annual Averages 1997-2002 (cont.)

	Annual Average 1997	Annual Average 1998	Annual Average 1999	Annual Average 2000	Annual Average 2001	Annual Average 2002
Retail Trade	67,183	69,181	71,432	74,475	72,598	72,339
Motor Vehicle and Parts Dealers	9,881	9,915	10,175	10,356	10,400	10,645
Building Material & Garden Equipment	6,405	6,736	7,161	7,445	7,438	7,698
Food and Beverage Stores	14,981	15,353	15,861	16,120	13,105	12,569
General Merchandise Stores	11,358	11,539	11,672	13,030	14,315	14,648
Transportation, Warehousing, & Utilities	17,624	18,161	19,004	19,406	19,152	18,583
Utilities	2,473	2,506	2,496	2,536	1,792	1,921
Transportation & Warehousing	15,151	15,655	16,508	16,870	17,360	16,662
Rail Transportation	1,582	1,476	1,464	1,453	1,304	1,302
Truck Transportation	7,173	7,611	8,210	8,559	8,457	8,157
Information	7,587	8,377	9,281	9,862	9,598	9,160
Telecommunications	2,050	2,450	3,046	3,502	3,321	3,192
Financial Activities	26,842	24,263	25,305	25,156	25,010	25,648
Finance & Insurance	16,976	17,790	18,603	18,652	18,434	19,153
Real Estate & Rental & Leasing	9,867	6,474	6,702	6,504	6,576	6,496
Professional & Business Services	47,348	50,787	54,822	60,649	67,657	68,889
Professional, Scientific, & Technical	21,801	23,166	24,886	27,414	28,814	28,328
Scientific Research and Development	7,842	7,598	7,814	8,266	8,034	7,352
Management of Companies & Enterpr	3,548	3,038	3,034	3,264	7,768	7,761
Administrative & Support & Waste Management	21,999	24,583	26,902	29,972	31,076	32,800
Administrative and Support Services	20,466	23,209	25,632	28,758	30,019	31,732
Educational and Health Services	46,351	49,249	50,578	53,025	56,965	59,752
Educational Services	4,258	5,106	5,369	5,479	5,991	6,256
Health Care & Social Assistance	42,093	44,143	45,209	47,546	50,974	53,496
Hospitals	10,429	10,924	11,139	11,679	12,914	13,356
Leisure and Hospitality	48,854	50,432	51,464	52,584	53,052	53,381
Arts, Entertainment, & Recreation	6,178	6,508	6,888	6,625	6,953	7,514
Accommodation & Food Services	42,676	43,924	44,576	45,959	46,099	45,866
Accommodation	8,139	8,208	8,315	8,205	7,990	7,673
Food Services & Drinking Places	34,537	35,716	36,261	37,754	38,108	38,194
Other Services	15,506	16,232	17,140	17,642	18,145	17,808
Total Government	100,188	102,247	105,071	108,220	110,166	111,873
Federal Government	12,899	12,796	12,836	13,502	13,287	13,421
State & Local Government	87,288	89,451	92,235	94,718	96,880	98,452
State Government	25,813	26,969	27,637	28,154	28,739	28,783
State Government Education	12,029	12,408	12,638	13,002	13,313	13,510
State Government Administration	13,785	14,561	14,999	15,152	15,425	15,273
Local Government	61,475	62,482	64,598	66,564	68,141	69,669
Local Government Education	32,177	32,989	34,084	34,959	35,726	36,230
Local Government Administration	28,148	27,675	28,528	29,080	29,725	30,771
Local Government Tribes	1,150	1,818	1,986	2,525	2,691	2,668

THE CALL TO DUTY: A CES PERSPECTIVE

The following information provides an update on how to classify civilians called to active military duty when reporting your monthly Current Employment Statistics (CES) survey figures.

A frequently asked question from CES reporters lately is:

Question: *How should we be reporting military reservists who are called up to active duty?*

There are three scenarios that apply to this question:

1. The employee is not working for or receiving pay from his civilian employer for the pay period that includes the 12th of the month.
2. The employee is not working for or receiving pay from his civilian employer for the pay period that includes the 12th of the month, but still receives benefits.
3. The employee is not working for his civilian employer for the pay period that includes the 12th of the month, but is receiving some pay for that pay period.

Answer: *In scenarios 1 and 2, do not count military reservists as employed.*

The Definitions and Instructions section located on the back of the CES form details what is to be included or excluded in Column [1] All Employees: The exclusion statement states that "All employees excludes...armed forces personnel on active duty during the entire pay period." In scenarios 1 and 2, military reservists on active duty during

the entire pay period who are not receiving any pay are not counted as employed for that pay period.

Answer: *In scenario 3, do count military reservists as employed.*

The Definitions and Instructions section located on the back of the CES form details what is to be included or excluded in Column [1] All Employees: The inclusion statement states that "All employees includes...Persons on other paid leave." In scenario 3, military reservists on active duty during the entire pay period who are receiving any pay are counted as employed for that pay period. Any person, including military reservists, on any type of paid leave should be included.

In summary:

If military reservists are not receiving any pay during the pay period that includes the 12th of the month, they are not counted as employed for that pay period.

If military reservists are receiving any pay, i.e. vacation pay, sick pay, administrative leave, or any other paid leave, during the pay period that includes the 12th of the month, they are counted as employed for that pay period.

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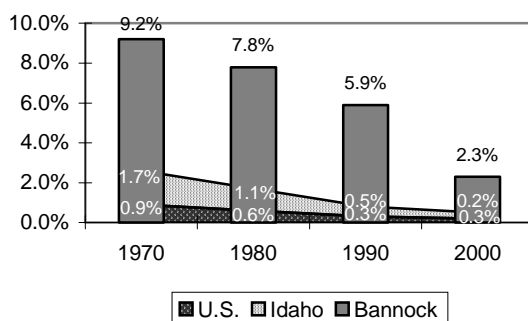
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merger changed the geography of the system and consolidated services, which moved railroad jobs away from Bannock County to locations where it optimized operational efficiency of the new system.

Railroad jobs in the U.S. and in Idaho represent a much smaller share of total nonfarm jobs and the change has not

been as drastic. In the U.S., railroad jobs represented just 0.9 percent of all nonfarm jobs in 1970. By 2000, that percentage decreased to just 0.3 percent, a change of just 0.6 percentage points. In Idaho, railroad jobs represented 1.7 percent of all nonfarm jobs in 1970. By 2000, that percentage decreased to 0.2 percent, a change of 1.5 percent. The railroad's relative importance to Bannock County's economy is much greater than it is in Idaho; and the railroad's relative importance to Idaho is greater than it is in the U.S.

Southeast Idaho Chart 4: Percentage of Nonfarm Jobs in the Railroad Sector, Compared



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Regular Features

Data Tables

- Each issue of *Idaho Employment* contains standard data tables. Current month, previous month, and year-ago data are included. There usually is a two-month time difference between the date of the newsletter and the data series month, i.e., the November newsletter contains September data.
- Labor Force Statistics: includes Civilian Labor Force, Total Employment, Number Unemployed, and Unemployment Rate. Tables are for the state, labor market areas, counties, and major cities.
- U.S. Unemployment Rate
- Nonfarm Employment by Industry: includes state and area tables for the month, previous month, and year-ago month. State data is more detailed than area data.
- Agricultural Employment: includes State data.
- Unemployment Insurance Program Statistics: includes Claims and Benefit Payment activities. State data.
- Hours and Earnings: includes Average Weekly Earnings, Average Weekly Hours, and Average Hourly earnings for selected, major industry groups. State data.

Narrative Analyses

Each newsletter provides a discussion of state and area labor market developments and reasons for them. Employment changes, business highlights in the area's counties, and other items of labor market interest are included. Six different area newsletters are prepared and included in each issue of *Idaho Employment*.

An FYI (*For Your Information*) section is a regular feature and contains data that is released periodically, such as Personal Income statistics, or articles prepared in response to frequently asked questions or current events affecting Idaho's labor market. The topical index is a list of items contained primarily in the FYI section.

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- » "Magic Valley Spotlight" Aug., pg. 3
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Glossary of Labor Market Terms

Agriculture Employment: Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

Average Hourly Earnings/Average Weekly Hours: The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12th of the month.

Average Weekly Earnings: Average Hourly Earnings multiplied by Average Weekly Hours.

Civilian Labor Force: A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

Consumer Price Index (CPI): A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

Covered Employers: Employers who are subject to state and federal Unemployment Insurance laws.

Durable Goods: Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

Employed: Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12th day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

Initial Claim: Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

Labor Market Area (LMA): An area that consists of a central city or cities and the surrounding territory within commuting distance. It is an economically integrated geographic area within which individuals can reside and find employment without changing place of residence. Idaho has nine LMAs.

Metropolitan Statistical Area (MSA): An area that has either a city with a population of at least 50,000 or a Bureau of Census urbanized area of at least 50,000 and a total metropolitan area of at least 100,000. The Office of Management and Budget designates the MSAs. There are two MSAs in Idaho—Boise City (including Ada and Canyon counties) and Pocatello City (including Bannock County).

Nonfarm Wage & Salary Employment: Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12th of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

Nondurable Goods: Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

Seasonally Adjusted: Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

Unemployed: Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12th of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

Unemployment Insurance: Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

Unemployment Rate: The number of persons unemployed expressed as a percentage of the labor force.

Weekly Benefit Amount: The amount payable to a claimant for a compensable week of total unemployment.

Weeks Claimed: The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

Weeks Compensated: The number of weeks for which compensation was actually paid.